QuickPen

AutoBid®

SheetMetal

Installation

QuickPen
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AutoBid® SheetMetal Installation

AutoBid SheetMetal is a powerful tool for making your bids faster, more accurate, and more informative. This user manual assumes that you already understand Microsoft Windows® operating systems. If this is not the case, QuickPen recommends that you take a workshop to start you off. Beginning classes are available in most areas. Ask your computer dealer for suggestions.

After your installation is complete, we recommend you complete the procedures in the Getting Started section. We have included an *AutoBid SheetMetal JumpStart Guide*, which will walk you through creating a project, processing a take off and running reports. The intent of this guide is to familiarize you with how the application works. We recommend that you review the *AutoBid SheetMetal Master Settings* online manual also, which provides additional information on setting up AutoBid SheetMetal on how your company does business.

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Chapter 1 Welcome

We’d like to hear from you!

Please e-mail comments, ideas, and suggestions for improving future manuals by one of the methods below.

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Your comments help us continue to provide accurate and easy-to-understand reference manuals for use with the QuickPen suite of products.

Software Installation

Contents

"Overview and Requirements"
"Trimble® Quick Link"
"Network/Stand-Alone Installation"
"Workstation Installation"
"Adobe® Reader®"

This Installation section covers installation and initial set up of AutoBid SheetMetal. Instructions to download Adobe® Reader® (if not already installed on your system) are also included.

Chapter 2 Overview and Requirements

AutoBid SheetMetal can be installed on a network or on a stand-alone, single-user computer. When installed on a network, it runs in a client/server environment. This chapter provides you with an overview of the installation process, as well as requirements for installation.

Network

When you install the software on a network, the database is contained in one location with access granted to various users at certain levels. Network installation also provides a central location for database management, maintenance and backups. After installing on the designated servers, you must install the software on each workstation needing access to the database. Routine backups should be performed on a regular basis. The installation provides an option to set up scheduled backups. QuickPen recommends you use this feature to safeguard your important data.

Stand-Alone

Installing on a single user computer allows access to the database on only that computer. It also provides a central location for the database, but no access from workstation computers. When AutoBid SheetMetal is installed on a stand-alone computer, routine backups of AutoBid SheetMetal should be performed and saved on a network location or other media (for example, DVD-RW, DVD) to ensure the data is not entirely lost in emergency situations.

DataServer

AutoBid SheetMetal requires installation of DataServer software. The DataServer software is automatically installed when you install AutoBid SheetMetal (either as a network or stand-alone installation). The AutoBid SheetMetal DataServer manages all database information.

Trimble Quick Link

HINT

QuickPen recommends that you install Trimble Quick Link before installing AutoBid SheetMetal.

The Trimble® Quick Link software utility allows you to easily manage licenses for your QuickPen and Trimble products. ***AutoBid SheetMetal requires Trimble Quick Link for licensing and communication purposes***. The software will not run without the Quick Link product.

The Trimble® Quick Link software has two modules available.

QuickPen Recommendations

- **Install Trimble Quick Link**
  You ***must*** install Trimble Quick Link before you install the AutoBid SheetMetal application.
  - **Trimble Quick Link Hub**
    The Hub serves as the central communication link between AutoBid SheetMetal and Quick Link Central (licensing server) located in QuickPen's corporate offices. ***The Quick Link Hub must be installed before you can install AutoBid SheetMetal.***

HINT

QuickPen recommends that the Trimble Quick Link Hub be installed in a central location accessible by all requiring access to Trimble and QuickPen software applications.

  - **Trimble® Quick Link Management Studio**
    - The Quick Link Management Studio allows you to manage your licenses from one convenient location.

- QuickPen recommends that you install at least one copy of the Management Studio at each or your company's physical locations.
- Limiting the number of Management Studio installations within your organization provides better license management and security.

Preliminary Installation Requirements

- You ***must*** have administrator privileges in order to install the software.
- It is your responsibility to install the required software and connect the hardware (if necessary).

CAUTION

While QuickPen Technical Support will assist you as much as possible, we may not be able to assist you with some hardware configuration issues. For assistance in such cases, check with the vendor who supplied the equipment, your local computer dealer, the documentation for your hardware, and/or your company's IT professional.

- ***Trimble Quick Link Video***
  The installation DVD includes a video introducing Trimble® Quick Link and how it improves licensing and communication for your QuickPen product. We strongly recommend that you view this video before installing AutoBid SheetMetal. Accessing the video is covered in the *"Trimble® Quick Link"* chapter.

Verify TCP/IP

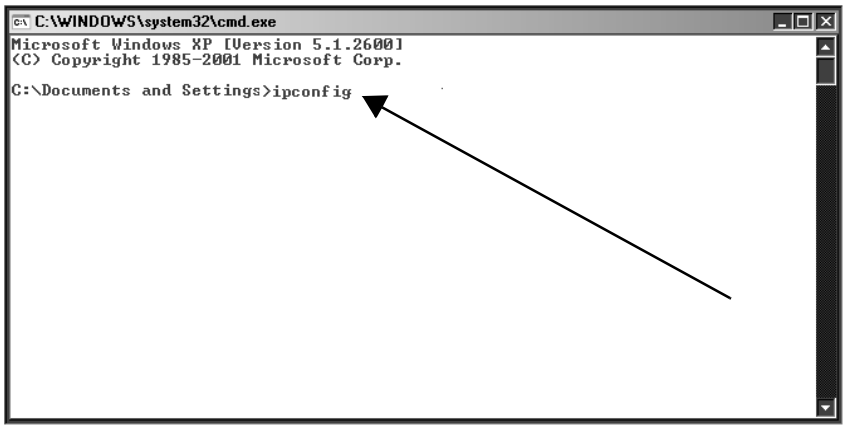
CAUTION

AutoBid SheetMetal and Trimble® Quick Link require TCP/IP (Transmission Control Protocol/Internet Protocol). Verify that it is installed on your system prior to installing the software.

The following instructions explain how to verify that TCP/IP is installed on your computer.

1. From Windows Start menu, navigate to **Run.**
2. In the Run window type **CMD**. Click **OK**.

A window similar to the illustration below displays.



3. At the prompt, type **IPCONFIG**. Press **Enter**. If you have TCP/IP installed, the IP Address for your machine will display.

HINT

If the IP Address does not display, or you get an error message, contact your company's IT professional for information. AutoBid SheetMetal and Trimble Quick Link require TCP/IP on your computer(s).

To close the window type **EXIT** at the prompt and press **Enter** on your keyboard.

Quick Reference

Locate the installation information you need using the following information table.

Procedure	Installation Quick Reference
Install Trimble® Quick Link	See *"Trimble® Quick Link" on page 19*.
Network	• See *“Network/Stand-Alone Installation” on page 25* • For Types of Network Installation, see *“Installation Options” on page 26*
Network Installation Options	• See *“Network Installation Reference” on page 27*
Client Workstation	See *“Workstation Installation” on page 39*
Stand-Alone	See *“Network/Stand-Alone Installation” on page 25*
New Hardware: Controller, Digitizer, TouchMenu, Smart Menu by GTCO™ and the MobileMenu	See *“Hardware Setup” on page 83*
Adobe Reader®	See *“Adobe® Reader®” on page 47*
Importing DOS Sheet Metal data into AutoBid SheetMetal	See the *Import from DOS* manual.

Chapter 3 Trimble® Quick Link

The Trimble® Quick Link software utility allows you to easily manage licenses for your QuickPen and Trimble products. ***AutoBid SheetMetal requires Trimble Quick Link for licensing and communication purposes.*** The software will not run without the Quick Link product.

Trimble® Quick Link has two modules available.

- **Quick Link Hub**
  This module is required for communicating with Quick Link Central (licensing server). See *"Install Trimble Quick Link Hub" on page 21* for more details on the hub. You ***must*** install at least one hub at your physical location.
- **Quick Link Management Studio**
  The Quick Link Management Studio allows you to manage your licenses. You can install it on one or multiple workstations. ***QuickPen recommends that you limit the number of management studio installed at your location.*** See *"Install Trimble Quick Link Management Studio" on page 23* for more information on this module.

Installation Recommendations / Requirements

To ensure proper operation of Trimble® Quick Link after installation, follow the steps below.

Before you install any new or updated software, take the following action:

- **Close down all Microsoft Windows® based applications on the server, including e-mail software.**
- It is recommended that the Trimble Quick Link Hub be installed in a central location accessible by all who require access to QuickPen and Trimble products.

- In network environments, the DataServer is installed in a central location (on a server) and workstations connect to it (Bid Administrator and Global Data Administrator).
- In a stand-alone installation, the DataServer, Bid Administrator and/or the Global Data Administrator are installed on the same computer.

HINT

For Windows Server 2008 and Server 2008 R2, ensure the .NET Framework Features have been enabled and all .NET updates have been performed. Contact your IT professional if you need assistance with this process.

Insert DVD

Insert the AutoBid SheetMetal Installation DVD into the appropriate drive of the computer where you want to install the Trimble Quick Link Hub. Wait a moment.

If the installation does not start a few seconds after you insert the installation DVD, proceed as follows:

- Double-click on the **My Computer** icon.
- Locate the drive containing the AutoBid SheetMetal Installation DVD. Click on it to display the contents of the DVD.
- Double-click ***AutoRun.exe*** to open the AutoBid SheetMetal main installation screen.

HINT

Depending on your computer settings, the file extension (***exe***) may not display.

Trimble Quick Link Video

The installation DVD includes a video introducing Trimble® Quick Link features that improve licensing and communication for your QuickPen product. We strongly recommend that you view this video before installing any software.

- In the main AutoBid SheetMetal installation screen, go to *Videos* and then click Q**uick Link Video Intro**. This video provides you with information about the Trimble Quick Link software application. QuickPen recommends that you view this video prior to beginning the installation process.
- When viewing is complete, you must maximize the main installation screen by clicking on your Taskbar

on your Taskbar.

Install Trimble Quick Link Hub

The Trimble Quick Link Hub provides communication with the Trimble/ QuickPen licensing server.

- Using the Quick Link Hub typically requires internet access to allow proper communication with the license server. If you do not have access to the internet, you must install the Quick Link Hub and then contact Trimble/QuickPen Technical Support for further instructions. ***Note:*** You must have access to e-mail.
- QuickPen recommends that you install the Hub on a computer that can be accessed by all Trimble or QuickPen software applications.
- Only one installation of the Hub is required for all Trimble and QuickPen applications (at each location).
- If your company has multiple locations using Trimble and/or QuickPen software applications, you must install the Hub at each physical location.
- If you are using the Trimble or QuickPen software as a Stand-Alone with no access to a network, you must install the Hub on that computer.

Hub Installation

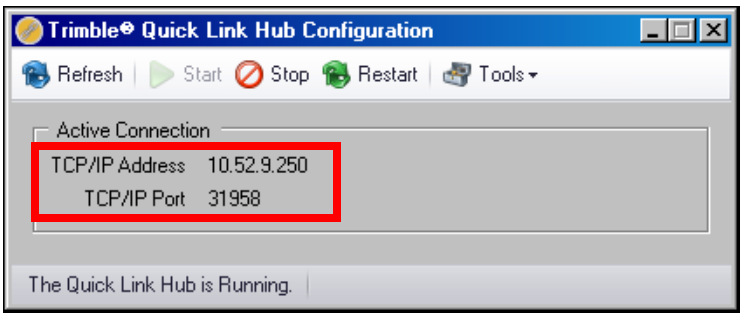
1. On the main AutoBid SheetMetal installation screen, click **Trimble Quick Link Installation** (under *Go to*).
2. Click **Quick Link Hub**.
3. The welcome screen displays. Click **Next**.
4. The License Agreement displays on the screen. Read the agreement. Choose **I accept the terms of the license agreement**. Click **Next**.

HINT

You must accept the terms of the agreement to proceed with the installation. If you want a hard copy of the agreements, click **Print.**

5. In the Choose Destination Location screen, click **Next**. We recommend that you accept the default location.
6. In the Ready to Install the Program screen, read the information provided. When you are ready to begin the procedure, click **Install**. The procedure installs the required files and configures the service. Please be patient as this process may take a few minutes.
7. Click **Finish**.
8. Open the Trimble Quick Link Hub to obtain the TCP/IP Address and TCP/IP Port for the computer where the software is installed. You need

this information when installing AutoBid SheetMetal. Also, you need this information when you install the Management Studio.



Install Trimble Quick Link Management Studio

HINT

QuickPen recommends that you limit the number of Management Studio installations within your organization. Limiting the number of Management Studio installations within your organization provides better license management and security.

1. If you are installing the Management Studio on a different computer, insert the DVD into the appropriate drive of that computer (refer to *page 20* for instructions). Click **Trimble Quick Link Installation** (under *Go to*).
   OR
   If you are installing it on the same computer, click **Quick Link Management Studio**. The routine prepares the files for installation.
2. The Welcome screen displays. Click **Next**.

3. The License Agreement displays on the screen. Read the agreement. **Choose I accept the terms of the license agreement**. Click **Next**.

HINT

You must accept the terms of the agreement to proceed with the installation. If you want a hard copy of the agreements, click **Print.**

4. In the Choose Destination Location screen, click **Next**. ***Note:*** QuickPen recommends that you accept the default location.
5. In the Ready to Install the Program screen, read the information provided. When you are ready to begin the procedure, click **Install**.
6. Click **Finish**. Refer to the *"Getting Started"* section in this manual for information on configuring the Management Studio. No action is required at this time.

Return to Main Page

In order to install the AutoBid SheetMetal software, click

and then refer to *"Network/Stand-Alone Installation"* chapter for instructions.

Chapter 4 Network/Stand-Alone Installation

This chapter explains how to install AutoBid SheetMetal software for use on a network or a stand-alone computer.

CAUTION

If you have not already done so, you ***must*** install Trimble® Quick Link before installing AutoBid SheetMetal. Refer to *"Trimble® Quick Link" on page 19* for more information.

Before you begin, determine the environment in which AutoBid SheetMetal will be used.

Network

If you will be using it on a network, proceed with the instructions outlined on the following pages. After you have completed the installation on the designated server computer, you must also install the software on the workstations. These procedures are covered in the *"Workstation Installation"* chapter.

Stand-alone

If you are installing on a stand-alone computer, complete the procedures on the following pages.

To ensure that your AutoBid SheetMetal application is installed properly, please follow the instructions as outlined in this chapter.

Installation Options

The AutoBid SheetMetal DataServer manages information in the AutoBid SheetMetal database.

HINT

QuickPen recommends that you install the DataServer to a physical drive rather than a mapped one.

Because the data is transferred via TCP/IP, you do not need direct access to the files on the server. ***Note:*** A shared directory is not required. When a shared directory is created and AutoBid SheetMetal is installed to this folder, licensing issues/problems will result. Your System Administrator can assist you with any questions.

Network Installation

When you install AutoBid SheetMetal as a network user, the DataServer must be installed on a computer designated as the server. All AutoBid SheetMetal workstations then connect to the DataServer computer.

You have the option to install both the AutoBid SheetMetal DataServer and AutoBid SheetMetal programs on the designated network server; however, installing the AutoBid SheetMetal program files on the network server is not required. See the following *Reference* table for information on the different installation options available.

Stand-Alone Installation

When you install as a stand-alone user, you must install all components of AutoBid SheetMetal on the computer. You will be given this option in the installation routine.

Network Installation Reference

The table below offers information on network installation options. Select the one that works best for your environment.

Type	Advantages	Disadvantages
AutoBid SheetMetal DataServer Installation	• DataServer functionality is available. • AutoBid SheetMetal program files (Global Data Administrator and Bid Administrator) are not installed. Therefore, less disk space is required. • Global Data Administrator and Bid Administrator security is not required at the server level.	• You cannot operate the AutoBid SheetMetal client-side programs at the DataServer (TakeOff, project maintenance, table and library maintenance). • You can access the database only from workstations.

Type	Advantages	Disadvantages
AutoBid SheetMetal Stand-Alone Installation on the network server	• DataServer functionality is available. • You can operate AutoBid SheetMetal programs at the DataServer computer (TakeOff, project maintenance, table and library maintenance). • You can access database functions from the server as well as from the workstations where AutoBid SheetMetal is installed.	• Requires additional disk space. • You may not be able to access the database if all available licenses are in use.

Preliminary Steps

Before you install the software, take the following action.

Close down all Microsoft Windows® based applications on the server, including e-mail software.

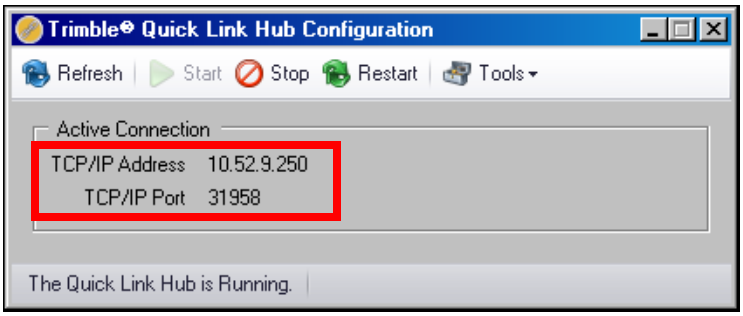
Common Installation Commands

During the installation process, you will see the following in many of the screens:

- To proceed with the installation and advance to the next window, click **Next**.
- If you want to return to the previous page, choose **Back**.
- **Finish** completes the installation.
- If you want to stop the installation, click **Cancel**. You will be asked to confirm the cancellation. Choose **Yes** if this was your intent. If you pressed the Cancel button in error, choose **No** and the installation will continue.

Quick Link Hub IP Address

Before you can install AutoBid SheetMetal, the installation routine must validate installation and communication of the Quick Link Hub. You must have this information available to proceed.



Installation Information

CAUTION

If you have not already done so, you ***must*** install Trimble® Quick Link before installing AutoBid SheetMetal. Refer to *"Trimble® Quick Link" on page 19* for more information.

You must install AutoBid SheetMetal on the stand-alone computer or the computer designated as the server (network installations).

Network Users

If you are a network user, the computer o n which you install AutoBid SheetMetal designates that machine as the server, which may not be what you intended to do. Before beginning the installation, you must also know the computer location (for example, the IP Address or server name).

HINT

QuickPen recommends that the Trimble® Quick Link Hub be installed in a central location accessible by all who need AutoBid SheetMetal licensing.

When you install AutoBid SheetMetal on a network server, you have two options.

Install the DataServer only

OR

Install a Stand-Alone version on the server

Refer to the *"Network Installation Reference"* table on *page 27* for information on the advantages/disadvantages for each of these installation types.

HINT

The network installation must first be performed on the computer designated as the “network server” or “database server”. This does not have to be the same computer already designated as your current network server. Workstation computers must be able to connect to this computer.

After you have completed the installation on the network server, you must install the AutoBid SheetMetal workstation program on all computers requiring access to the database. The Workstation installation instructions begin on *page 39*.

Stand-Alone Users

Stand-alone users need only install the software on the designated AutoBid SheetMetal computer.

Insert DVD

HINT

If you are installing immediately after viewing the Quick Link Video, you can proceed directly to *"Stand-Alone/Network Procedures" on page 33*.

Insert the Installation DVD into the appropriate drive of the computer designated as the AutoBid SheetMetal stand-alone or server computer. Wait a moment.

If the installation does not start a few seconds after you insert the installation DVD, proceed as follows:

- Double-click on the **My Computer** icon.
- Locate the drive containing the AutoBid SheetMetal Installation DVD. Click on it to display the contents of the DVD.
- Double-click ***AutoRun.exe*** to open the AutoBid SheetMetal main installation screen.

Stand-Alone/Network Procedures

To install AutoBid SheetMetal, proceed with the following instructions.

HINT

You must have the TCP/IP Address and TCP/IP Port for the Quick Link Hub. If you have not yet installed the Trimble® Quick Link software, you must do so before you can install AutoBid SheetMetal.

1. In the Installer area, click **AutoBid SheetMetal**.

   QuickPen has built-in several validations to ensure Trimble® Quick Link and AutoBid SheetMetal can communicate properly after installation. Your Quick Link Hub must be validated before you can continue the installation.

2. In the Check Quick Link Installation dialog, enter the following information:

   Hub Address

   This is the TCP/IP Address assigned to the Quick Link Hub.

   Port

   This is the TCP/IP Port assigned to the Quick Link Hub. ***Note:*** The default Port should always be **31958**.

   Click **Continue Install**.

   Validation Procedure

   When you click Continue Install, the application validates the installation and communication with the Quick Link Hub.

   - If the installation/communication is validated, the installation routine will proceed. Go to *Step 3* below.
   - If installation/communication cannot be validated, click **Go Back** and make sure you have entered the correct information. Make any

necessary corrections and then click **Continue Install** again. Go to *step 3* below.

HINT

If you have entered the correct information and the data cannot be validated, you will need assistance from your IT professional. QuickPen has provided an Installation Checklist document to step through some troubleshooting procedures in order to make sure your environment allows the proper required communication.

Continue Installation

3. The InstallShield Wizard prepares to install the software. ***Please be patient.*** This process may take a few minutes.
4. The Welcome to the Installation Wizard for QuickPen AutoBid SheetMetal screen displays. Click **Next**.
5. The License Agreement displays on the screen. Read the agreement. Choose **I accept the terms of the license agreement.** Click **Next**.
6. The Support License Agreement displays on the screen. Read the agreement. Choose **I accept the terms of the support license agreement.** Click **Next**.

HINT

You must accept the terms of each agreement to proceed with the installation. If you want to print the agreements before proceeding, click the **Print** button.

7. The Access Control Options screen displays. Choose one of the following options.

Access is allowed for anyone who uses this computer (all users)

This allows anyone who logs into your computer (regardless of login information) to open the software application. They must, however, have proper security rights to use AutoBid SheetMetal.

Access is allowed only for me (computer or user name displays)

This allows only the login that matches the computer or user name to open the software application.

Click **Next**.

8. In the Select QuickPen AutoBid SheetMetal Options screen, choose one of the following options.

   AutoBid SheetMetal Stand Alone (includes both DataServer and Workstation)

   The Stand-Alone option provides full access to AutoBid SheetMetal (DataServer, Global Data Administrator and Bid Administrator) on the installation computer. If this is your designated server, full access is available on this computer also.

   - *Stand-Alone users must select this option*
   - ***Network users***: You can choose *this* option, depending on your preferences. Refer to the information under *"Network Installation Reference" on page 27* for installation options available

   AutoBid SheetMetal DataServer

   For Network users only: You can access only the DataServer from the installation computer when you use this option. The Global Data Administrator and the Bid Administrator can be accessed only from one or more workstations.

   Click **Next**.

9. The Choose AutoBid SheetMetal Destination Location screen displays. *QuickPen recommends that you install the software in the default location displayed on the screen.* Click **Next**.

10. The Choose ASA Database Server Destination Location screen displays. *QuickPen recommends that you install the software in the default location displayed on the screen.* Click **Next**.
11. The Select Other Options screen displays. Depending on your preferences, choose or clear the checkboxes on this screen.

    Start the DataServer when Windows starts

    This selection automatically opens the DataServer when you login to the computer.

    Place an icon onto the desktop for the DataServer program

    Choosing this option allows easy access to the DataServer.

    Place icons onto the desktop for the Workstation programs

    This option will place icons for all AutoBid SheetMetal modules on the desktop. ***Note:*** This option does not display if you are installing *only* the DataServer.

    Click **Next**.
12. In the Enter TCP/IP Port screen, you can either accept the default or enter the **Port** number you want to use for the DataServer. If you need assistance with the settings on this screen, discuss with your System Administrator. Click **Next**.
13. Scheduled backups of your AutoBid SheetMetal database can be set up at this time. This allows you to backup your database on a daily basis at a time and location you specify. *QuickPen recommends that you set these parameters during the installation procedure in order to safeguard data entered in the system.*

    You can modify settings at a later time in the AutoBid SheetMetal DataServer program window. See the online manual *Master Settings and System Maintenance* manual or the DataServer online help system for more information.

    a. Click the **Yes** radio button if you want to set the options for Scheduled Backups. Click **Next**.

b. Enter the location (drive letter and folder) where you want the backups created. You can also accept the AutoBid SheetMetal default. Click **Next**.

c. In the Scheduled Backup Time window, click the checkbox next to the time you want the backup to begin.

HINT

See *"Scheduled Database Backups" on page 64* or online help system for more details about scheduled backups.

Click **Next**.

14. AutoBid SheetMetal includes video libraries demonstrating some of the features in the software. Depending on the type of installation you are doing, the Copy the video files to the local drive screen displays. Choose one of the following options.

    Copy the video files to the local disk

    Don't copy the video files to the local disk

HINT

QuickPen strongly recommends that you install the videos as they provide information on how the AutoBid SheetMetal application operates. You can easily delete the videos when no longer needed.

15. A recap of your selections displays in the Start Copying Files screen. If you are satisfied with the data displayed, click **Next**. The installation routine places all required files.

16. An information message pertaining to Trimble® Quick Link displays. Read the message and then click **OK**. ***Note: If you have not yet installed Trimble Quick Link, you should do so when the AutoBid SheetMetal installation is complete*** *(after step 15 below).*

17. When all files are installed, click **Finish** to complete the installation.

Trimble Quick Link Configuration

Refer to the *"Trimble Quick Link Configuration" on page 52* of this manual to configure the Trimble Quick Link Management Studio. If you have installed as a network, you should complete this configuration prior to installing the workstations.

DataServer Settings

After installation is complete, you can define additional values and run commands to setup DataServer parameters. See *"DataServer/Application Settings" on page 57* for information and instructions.

Workstation

If you installed AutoBid SheetMetal on a network, you must install the application on each workstation requiring access to the AutoBid SheetMetal database. (This access is required in order to run the software.) See *"Workstation Installation" on page 39* for instructions.

Start AutoBid SheetMetal

When the AutoBid SheetMetal installation is complete, refer to *"Open AutoBid SheetMetal" on page 53* for instructions on starting AutoBid SheetMetal from the computer designated as the database server or on a stand-alone machine.

Chapter 5 Workstation Installation

AutoBid SheetMetal must be installed at each individual workstation requiring access to the database. This step activates the software on each workstation, allowing it to communicate with the AutoBid SheetMetal DataServer.

Before you begin workstation installations, please complete the installation of AutoBid SheetMetal on the designated server computer.

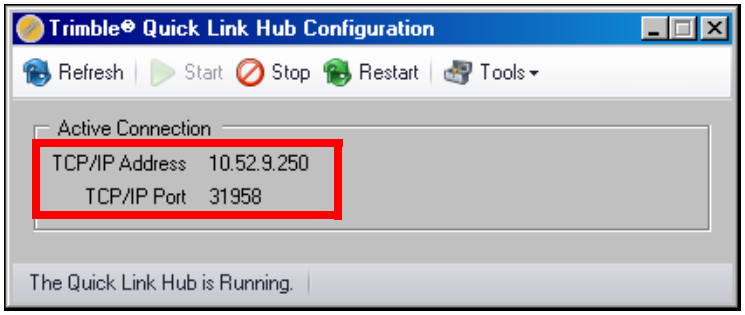
Preliminary Steps

Before you install the software, take the following actions.

Close down all Microsoft Windows® based applications on the workstation computer, including e-mail software.

Quick Link Hub IP Address

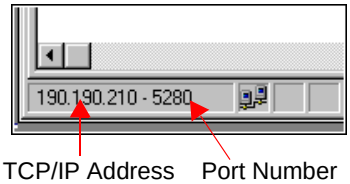
Before you can install AutoBid SheetMetal, the installation routine must validate installation and communication of the Quick Link Hub. You must have this information available to proceed.



DataServer IP Address

During the Workstation installation you must enter the TCP/IP address and Port number to access the computer where the DataServer is installed. This information can be found:

- In the lower left corner of the AutoBid SheetMetal DataServer window.



- You can also refer to *"Verify TCP/IP" on page 16* for instructions on how to obtain this information at the AutoBid SheetMetal DataServer computer.

Make sure you have this information available before you begin the installation process.

Insert DVD

Insert the AutoBid SheetMetal Installation DVD into the appropriate drive of the computer designated as the workstation computer. Wait a moment.

If the installation does not start a few seconds after you insert the installation DVD, proceed as follows:

- Double-click on the **My Computer** icon.
- Locate the drive containing the AutoBid SheetMetal Installation DVD. Click on it to display the contents of the DVD.
- Double-click AutoRun.exe to open the AutoBid SheetMetal main

Workstation Procedures

HINT

You must have the TCP/IP Address and TCP/IP Port for the Quick Link Hub. If you have not yet installed the Trimble® Quick Link software, you must do so before you can install AutoBid SheetMetal.

1. In the Installer area, click **AutoBid SheetMetal**.

   QuickPen has built-in several validations to ensure Trimble® Quick Link and AutoBid SheetMetal can communicate properly after installation. Your Quick Link Hub must be validated before you can continue the installation.

2. In the Check Quick Link Installation dialog, enter the following information:

   Hub Address

   This is the TCP/IP Address assigned to the Quick Link Hub.

Port

This is the TCP/IP Port assigned to the Quick Link Hub. ***Note:*** The default Port should always be **31958**.

Click **Continue Install**.

Validation Procedure

When you click Continue Install, the application validates the installation and communication with the Quick Link Hub.

- If the installation/communication is validated, the installation routine will proceed. Go to *Step 3* below.
- If installation/communication cannot be validated, click **Go Back** and make sure you have entered the correct information. Make any necessary corrections and then click **Continue Install** again. Go to *step 3* below.

HINT

If you have entered the correct information and the data cannot be validated, you will need assistance from your IT professional. QuickPen has provided an Installation Checklist document to step through some troubleshooting procedures in order to make sure your environment allows the proper required communication.

Continue Installation

3. The Welcome to the Installation Wizard for QuickPen AutoBid SheetMetal screen displays. Click **Next**.
4. The License Agreement displays on the screen. Read the agreement. Choose **I accept the terms of the license agreement.** Click **Next**.

5. The Support License Agreement displays on the screen. Read the agreement. Choose **I accept the terms of the support license agreement.** Click **Next**.

HINT

You must accept the terms of each agreement to proceed with the installation. If you want to print the agreements before proceeding, click on the **Print** button.

6. The Access Control Options screen displays. Choose one of the following options.

   Access is allowed for anyone who uses this computer (all users)

   This allows anyone who logs into your computer (regardless of login information) to access the database. They must, however, have proper security rights to access AutoBid SheetMetal.

   Access is allowed only for me (computer or user name displays)

   This allows only the login that matches the computer or user name to access the database.

   Click **Next**.

7. In the Select Options screen, choose **AutoBid SheetMetal Workstation**. Click **Next**.
8. The Choose AutoBid SheetMetal Destination Location screen displays. *QuickPen recommends that you install the software in the default location displayed on the screen.* Click **Next**.
9. The Select Other Options screen displays. Click **Place icons onto the desktop for the Workstation programs**. This option places the Global Data Administrator and the Bid Administrator icons on the desktop. Click **Next**.
10. The **TCP/IP** *(Internet Protocol Address)* connects the workstation to the computer where the DataServer is installed. The **Port** identifies how to

access the DataServer software on the network computer.
In the Enter TCP/IP and Port screen, enter the following information:.

TCP/IP

This is the address of the DataServer. If you do not have this information, refer to *"DataServer IP Address" on page 40* for instructions. If you need additional assistance, contact your System Administrator.

CAUTION

This field defaults to the Stand-Alone IP address. To provide connectivity to the DataServer, you ***must*** enter the appropriate IP address for the server!

Port

Enter the Port number you will use to access the AutoBid SheetMetal DataServer. If you need assistance with this setting, see your System Administrator.

Click **Next**.

11. AutoBid SheetMetal includes a video library demonstrating the new features included in the current release. In the Copy the video files to local drive screen, choose one of the following options.

    Copy the video files to the local disk

    This copies the video library to the hard drive of the computer where you are installing AutoBid SheetMetal. Keep in mind that the video files are large and require adequate disk space for viewing. Once the videos have been viewed, you can easily delete them when no longer needed. Refer to *"Video Presentations" on page 116* for additional information.

Don’t copy the video files to the local disk

When you select this option, you cannot view the videos from within AutoBid SheetMetal. They can be viewed from the Installation DVD.

Click **Next**.

12. A recap of your selections displays in the Start Copying Files screen. If you are satisfied with the data displayed, click **Next**. The installation begins.
13. Choose **Finish** to complete the installation.

Trimble Quick Link Configuration

If the Trimble Quick Link Management Studio is installed on the workstation, refer to the *“Trimble Quick Link Configuration” on page 52* for configuration procedures.

Start AutoBid SheetMetal

The AutoBid SheetMetal installation is complete. Refer to *“Open AutoBid SheetMetal” on page 53* for instructions on starting AutoBid SheetMetal.

Chapter 6 Adobe® Reader®

AutoBid SheetMetal includes online manuals in a portable document format (PDF). Direct access *Hyperlinks* throughout the manuals give you easy access to various topics. You can also print all or part of any AutoBid SheetMetal online manual.

HINT

If Adobe Reader is already installed on the workstation, it must be at least version 7.0 to open and view the AutoBid SheetMetal manuals on-screen.

If you currently have Adobe Reader 7.0 or above installed on the workstation, you can disregard this step.

Adobe Reader Information

To verify that you have Adobe Reader Version 6.0 or greater installed on your computer, do the following.

1. Open Adobe Reader. Choose **Help > About Adobe Reader**.
2. In the product information window verify that the version is 6.0 or greater.
   - If it is, no further action is necessary.
   - If not, you must install Adobe Reader.

Other Considerations

- If you have installed AutoBid SheetMetal on a network with workstations, you must install Adobe Reader on each workstation.
- If you have installed AutoBid SheetMetal on a stand-alone computer, Adobe Reader must be installed on this computer.

Download/Install Adobe Reader

To install a free copy of Adobe Reader, follow the instructions below.

Adobe Reader is not installed on your system

1. Insert the AutoBid SheetMetal Installation DVD into the appropriate drive of the stand-alone or workstation computer. Wait a moment. The AutoBid SheetMetal installation window displays.
2. On the main AutoBid SheetMetal installation screen, proceed as follows:

   Under Go to, click **Adobe® Reader® Download**.

3. The Adobe Systems Incorporated website opens. Locate the *Download* area on the home page.
4. Locate Adobe Reader.
5. Follow the on-screen instructions.

Note the following:

- If you have an older version of Adobe Reader, you may receive a message indicating that the older version must be removed prior to installing the new version. If you receive this message, proceed with the removal process. Once removal is complete, go back to *Step 1* and begin the installation again.
- If version 7.0 or above is installed, and you do not want to install an updated version, Click **OK**. to exit the message window. Choose **Cancel** to exit the Adobe Reader installation program.

Getting Started

Contents

"Getting Started"
"Hardware Setup"

The Getting Started section provides information on initial AutoBid SheetMetal access, as well as using the online manuals.

Chapter 7 Getting Started

When you complete the installation of your AutoBid SheetMetal software, you are ready to create the preliminary settings to run the program.

This chapter provides you with instructions on what to do after the installation is complete, including:

- Configuring Trimble® Quick Link
- DataServer information
- Backup settings

Before you proceed with the directions contained in this chapter, make sure you have installed all required software as outlined in the *"Software Installation"* section of this manual.

Trimble Quick Link Configuration

Before you can use the Trimble Quick Link Management Studio, it must be configured to communicate with the Hub.

The Quick Link Management Studio requires a login name and password. This provides security for other sensitive information and your product licenses. Trimble Quick Link includes defaults that allow you initial access to the database. You can add users/passwords under **Tools > Quick Link Employees**. See the Trimble Quick Link online help system for instructions.

1. Open the Trimble Quick Link Management Studio using one of the following methods:

   Click

   on your Desktop.

   OR

   Go to the Windows Start menu and navigate to **Trimble® Quick Link**. Click on it and then click **Management Studio**.

HINT

The Trimble® Quick Link Hub must running before you can open the Trimble® Quick Link Management Studio.

2. In the Connect to the Trimble® Quick Link Hub screen, enter the following:

   Login Name

   admin

Password

admin

HINT

We recommend that you change the password for the default login as soon as possible in order to protect your data. Make note of the new password.

3. If you want to save the password for future use, click the **Remember Password** checkbox.
4. Review the information presented on this screen and then enter the IP **Address** for the Trimble Quick Link Hub.

CAUTION

Do not change the Port number. Changing the Port number will cause connectivity conflicts to the Hub (based on firewall settings). It is highly recommended that the default Port number is used. Contact your system administrator for more information.

5. Click **OK**. The Quick Start Wizard opens. This wizard guides you through setting up the Management Studio for proper licensing and communication. Refer to the Trimble Quick Link online help system for instructions on completing the wizard.

Open AutoBid SheetMetal

Accessing AutoBid SheetMetal is the same for network and stand-alone installations.

- Verify that the AutoBid SheetMetal DataServer is open and running (either minimized or maximized) on the network server or on the stand-alone computer before proceeding.
- Verify that the Trimble Quick Link Hub is running.

QuickPen provides you with an initial user name and password to access the database for the first time. The initial user name and password allows access to all areas of AutoBid SheetMetal. The initial password is included at the end of this manual. We strongly suggest that you immediately change this password to one of your choice. Be sure to make note of the new password. QuickPen also suggests that you create at least one employee in AutoBid SheetMetal. This employee should be assigned full rights to access AutoBid SheetMetal.

HINT

The AutoBid SheetMetal DataServer *must* be running on the computer designated as the server to activate the AutoBid SheetMetal database. You will receive an error message if the DataServer is not running.

AutoBid SheetMetal DataServer

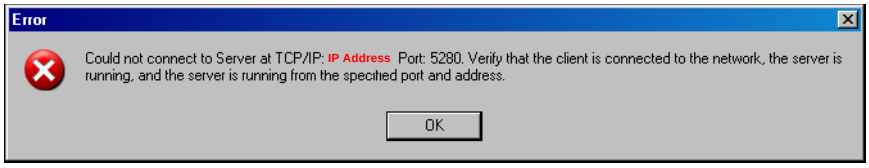
The AutoBid SheetMetal DataServer must be open to start using the database. If you have installed the application on a network and

- You attempt to open the database from a workstation.

AND

- The DataServer not running.

You will receive an error message similar to the following.


Error
Could not connect to Server at TCP/IP: IP Address Port: 5280. Verify that the client is connected to the network, the server is running, and the server is running from the specified port and address.
OK

HINT

If you are running Autobid SheetMetal on a stand-alone machine, the DataServer will open automatically when you launch Global Data Administrator and/or the Bid Administrator.

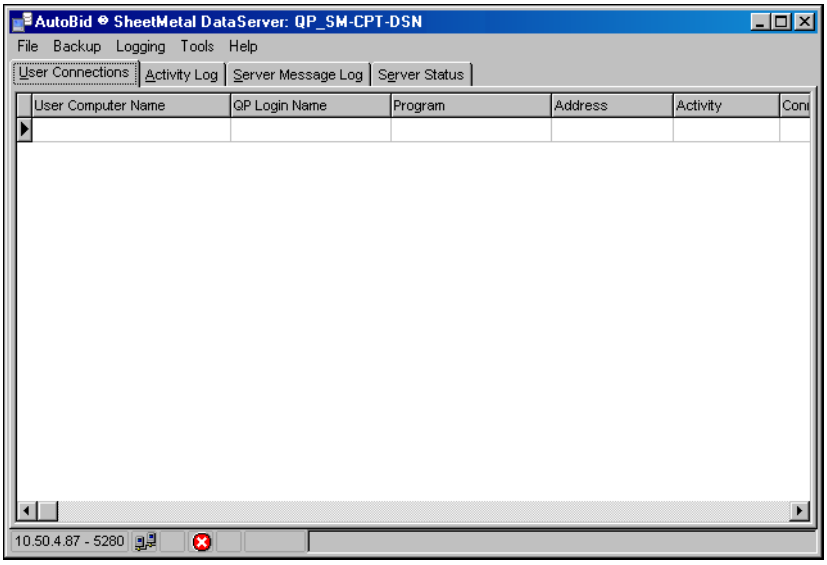
To start the DataServer, proceed as follows.

1. Double-click on the **DataServer** icon on your desktop.

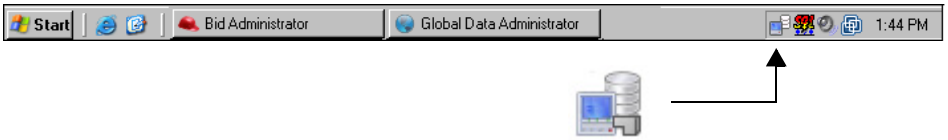
   OR

   Choose the **Start** menu and then navigate to **AutoBid SheetMetal > DataServer**.

The AutoBid SheetMetal DataServer window opens.



2. Minimize the window by clicking in the upper right corner of the window. It will now appear on your windows system tray as follows.



CAUTION

Do ***not*** close the DataServer or you will not be able to open the AutoBid SheetMetal application.

- When minimized, the AutoBid SheetMetal DataServer icon displays in the Windows System Tray. To open the DataServer window, double click on either the desktop icon or the icon in the system tray.
- If you want to close the QuickPen DataServer, choose **File > Exit**. Remember, you cannot access the AutoBid SheetMetal database unless the DataServer is running.

DataServer/Application Settings

Before you start using AutoBid SheetMetal, it is necessary to define values and perform application setup commands in the DataServer application. Complete the following procedures to complete this setup.

1. If the AutoBid SheetMetal DataServer is minimized, maximize it by double-clicking on the in the system tray.

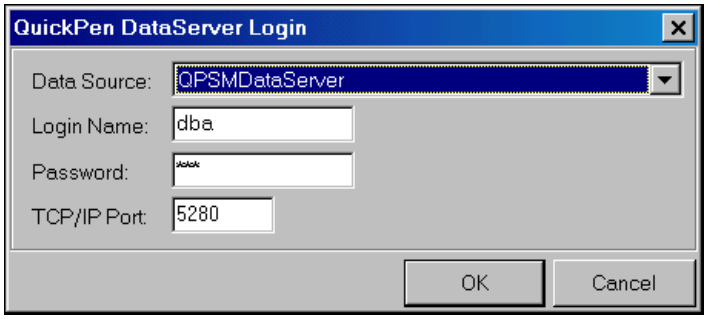
   OR

   If the AutoBid SheetMetal DataServer is closed, double-click on the **DataServer** icon on your desktop.

   OR

   Choose the **Start** menu on your Windows taskbar. Choose **Programs > AutoBid SheetMetal > DataServer**.

Depending on your Windows settings, you may see the QuickPen DataServer Login window[1].



2. If the QuickPen DataServer Login displays, complete or verify the following information.

Data Source

The choice from the picklist depends upon the type of installation you performed, Typical or Custom.

Typical

If you performed a typical installation, choose the appropriate Data Source from the picklist. This might display as follows **QP_SM_[ComputerName]_DSN.**

Custom

If you performed a typical installation, you must choose the name you gave the server during the setup procedure.

Login Name

Enter **dba** (if not displayed as a default).

---

1. *In most cases, the DataServer will start automatically with no need for login.*

Password

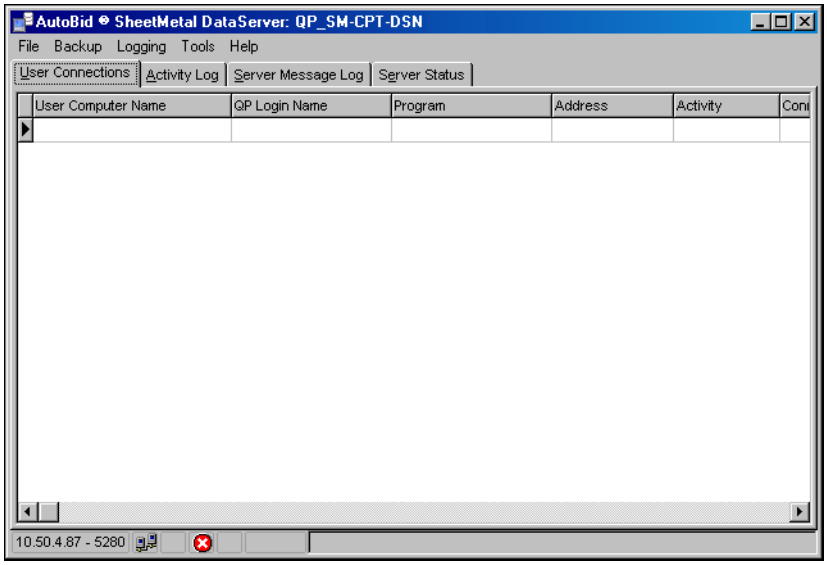
Enter the **Password** to access the DataServer. For security purposes, the password displays as ******* on the screen. The default password is included at the end of this manual.

Port to Open

Enter a value in this field if you want to use a different Port Number other than the default. The Port Number you use is at your discretion.

Click **OK**.

The AutoBid SheetMetal DataServer window displays.



Backup Parameters

With any software package, periodic backups of your data should be performed. This provides you with a safeguard against data loss in your AutoBid SheetMetal system.

CAUTION

You must complete the procedures outlined in order to produce accurate and timely backups of your database. Failure to complete these procedures may cause loss of data in your AutoBid SheetMetal database.

Backup and Restore Login

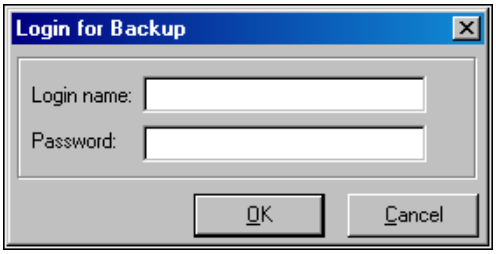
HINT

You must have proper access rights to perform the backup and restore features.

To perform many of the Backup and Restore functions, you are required to login to the database. This feature provides additional security for database protection.

1. In the AutoBid SheetMetal DataServer window, choose **Backup** and the command you want to perform. You will be required to login. The following is an example of the Login for Backup window. Other login

windows are similar in content and appearance.



Complete the following fields.

Login name

Enter your login name or ‘*admin*’ in the Login name field.

Password

Enter the **Password** to access the window. The default AutoBid SheetMetal password is included on the last page of this manual.

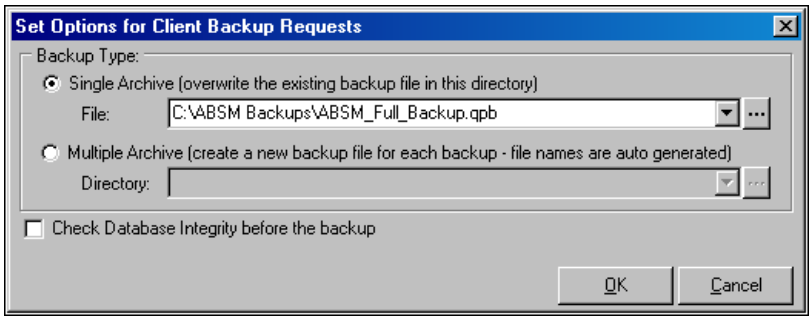
2. Click OK.

The window associated with the command selected opens.

Client Requested Options

Default backup options are set in the AutoBid SheetMetal DataServer. This procedure allows you to modify the default settings based on your company policy.

1. In the AutoBid SheetMetal DataServer window, choose **Backup > Client Backup Options**.
2. Login according to the instructions on *page 60*.
   The Set Options for Client Backup Requests window opens.


Set Options for Client Backup Requests
Backup Type:
Single Archive (overwrite the existing backup file in this directory)
File:
C:\ABSM Backups\ABSM_Full_Backup.qpb
Multiple Archive (create a new backup file for each backup - file names are auto generated)
Directory:
Check Database Integrity before the backup
OK
Cancel

3. Choose and complete data for one of the following options.

Single Archive

The **Single Archive** radio button overwrites the previous backup file. Choosing this option requires less attention to disk space maintenance. However, it does not preserve previous periodic backup files.

When you choose the Single Archive option, you must also enter a location (Drive and folder) and file name in the File field. The file name selected is the name of your single archive file each time a backup is created. For example, you might want to use ***ABSM Full Backup*** as the backup file name. All backup files created will be called **ABSM Full Backup.QPB**.

Multiple Archive

The **Multiple Archive** radio button creates a separate file each time a back up is created. This option preserves all previous backup files.

When you choose the Multiple Archive option, you must also specify the **Directory** (folder) where you want the backups created. The file name is generated automatically by AutoBid SheetMetal in the following format ***YYYY-MM-DD HHMM.SS.QPB***. For example, a backup file created on October 28, 2006 at 11:15.25AM will be called **2006-10-28 1115.25.QPB**.

Because a separate file is created each time, maintenance is required to avoid disk space problems. If not done so already, you should develop a policy for retaining older backup files of your AutoBid SheetMetal system.

4. If desired, click the **Check Database Integrity before the backup** checkbox. Checking the database integrity locates errors and broken links and automatically corrects them. ***Note:*** This feature does not look at data in individual projects.
5. Click **OK**.
6. When you are done working in the AutoBid SheetMetal DataServer, click on the in the upper right-corner.
   OR
   If you want to close the AutoBid SheetMetal DataServer, choose **File > Exit**.

HINT

Clicking .in the DataServer window minimizes the window. To close the DataServer, you must use the menu command.

The defaults are now set and will be used for future client requested backups. You have the option of overwriting these defaults when you perform backups from the Autobid SheetMetal DataServer. However, backups performed while in the Global Data Administrator are created based on the settings selected in Client Backup Options.

Scheduled Database Backups

AutoBid SheetMetal includes the option of creating regularly scheduled backups, which occur daily at the time you specify. This option protects your data with no required action on your part. Other options can be scheduled at the same time scheduled backups are performed.

Scheduled backups are not automatically saved from day-to-day. Each backup performed overwrites the backup from the previous day. Contact your System Administrator for information on how your company-wide system backups are handled.

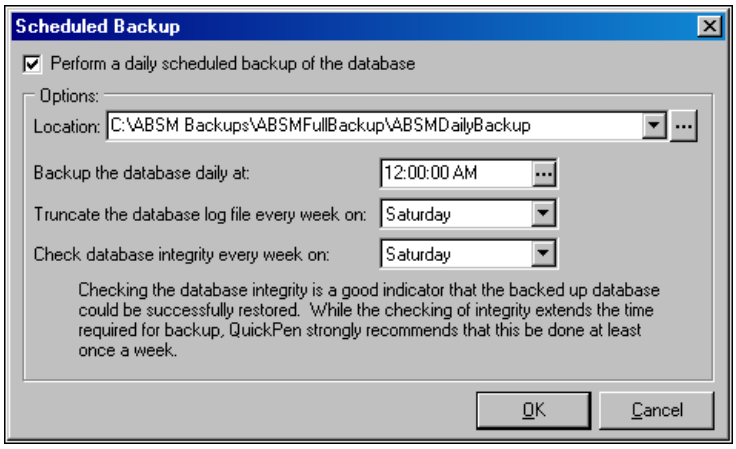
HINT

The AutoBid SheetMetal DataServer must be running to produce a scheduled backup. If the DataServer is closed, a backup will not be created.

Parameters for daily backups may have been set during the installation process. If these were not set or you want to modify these parameters, complete the following steps.

1. In the AutoBid SheetMetal DataServer window, choose **Backup > Scheduled Backup Options**.

2. Login according to the instructions on *page 60*.
   The Scheduled Backup window opens.


Scheduled Backup
Perform a daily scheduled backup of the database
Options:
Location: C:\ABSM Backups\ABSMFullBackup\ABSMDailyBackup
Backup the database daily at: 12:00:00 AM
Truncate the database log file every week on: Saturday
Check database integrity every week on: Saturday
Checking the database integrity is a good indicator that the backed up database could be successfully restored. While the checking of integrity extends the time required for backup, QuickPen strongly recommends that this be done at least once a week.
OK
Cancel

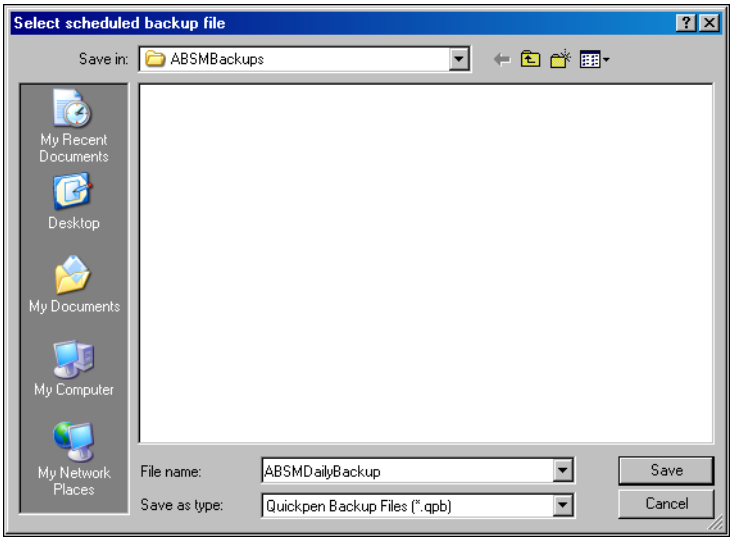
3. Select the **Perform a daily scheduled backup of the database** checkbox.
4. Complete the following information in the Options pane.

   Location

   Enter the Location (Drive letter, folder and file name) where you want the scheduled backup created. If this is not the first time you have set scheduled backup parameters, you can select Default Backup Location from the list if desired. This will create the backup under the AutoBid SheetMetal folder, for example, **C:\ABSM Backups\ABSMDailyBackup**.
   OR

   Click ... to browse to the location of your choice.

The Select scheduled backup up file displays.



Browse to the desired backup location.
Enter the desired backup file name.
Choose **Save**.
QuickPen recommends that you select a location other than the hard drive where your AutoBid SheetMetal system is installed.

Backup the database daily:

HINT

Network users: Make sure you allow enough time for your daily backup to *complete* before your server system backup begins. Because the DataServer must remain open for a scheduled backup, none of the AutoBid SheetMetal files will be included in your server backup. The scheduled backup file will be included if you are creating the file on your network server, provided it is completed!

See your System Administrator for more information.

Click on the ellipsis button and select the time you want the scheduled backup created.
OR
This data can be entered in the follow format: **HH:MM:SS AM** or **HH:MM:SS PM**.

You might want to choose a time when no one is working in AutoBid SheetMetal. While the backup will still be created, it will slow processing for other users working in the application.

Truncate the database log file every week on

Choose an option from the picklist. The AutoBid SheetMetal DataServer saves all information in the database log file. After extensive use of the database, the size of this file may become unmanageable. The truncate feature will reduce the size of the file on a weekly basis.

CAUTION

The database log file is included in all full backups. QuickPen recommends that you truncate the database logs on a weekly basis *only* if you have performed periodic full backups.

Check the database integrity every week on

If desired, choose the appropriate interval in the **Check Database Integrity before the backup** picklist. Checking the database integrity locates errors and broken links and automatically corrects them.
Note: This feature does not look at individual projects.

CAUTION

QuickPen recommends that you check database integrity on a regular basis. Keep in mind that the integrity check may take several hours (depending on the size of your database). It is advisable to only perform this function during a time when no one will be using AutoBid SheetMetal.

5. Click **OK**. The backup will be created at the time you specify. Be sure to leave the AutoBid SheetMetal DataServer open or the backup cannot be created.

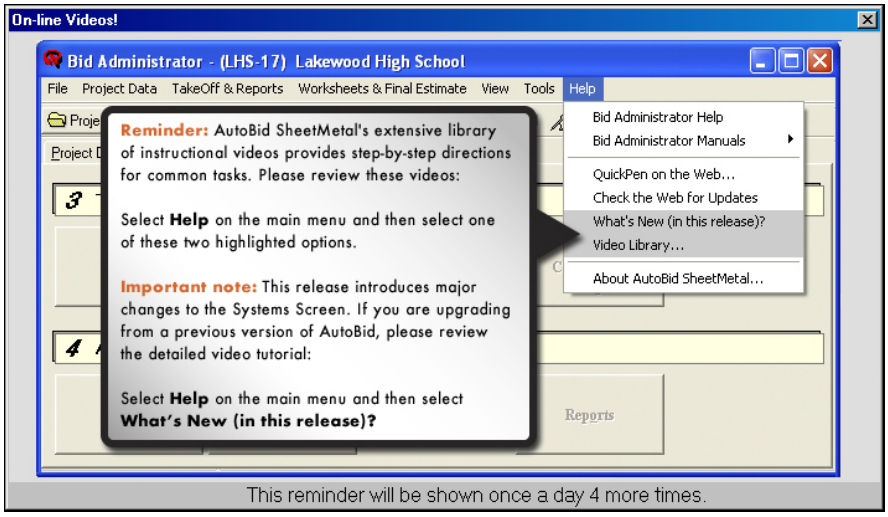
Open AutoBid SheetMetal

Before the Global Data Administrator or Bid Administrator can be opened, the DataServer must be open and running.

- If you are using the application on a stand-alone computer, the DataServer automatically opens when you start either module.
- If you are using the application on a network, make sure the DataServer is open and running on the computer designated as the server.

The first time you open the Global Data Administrator or the Bid Administrator, you may receive two message screens.

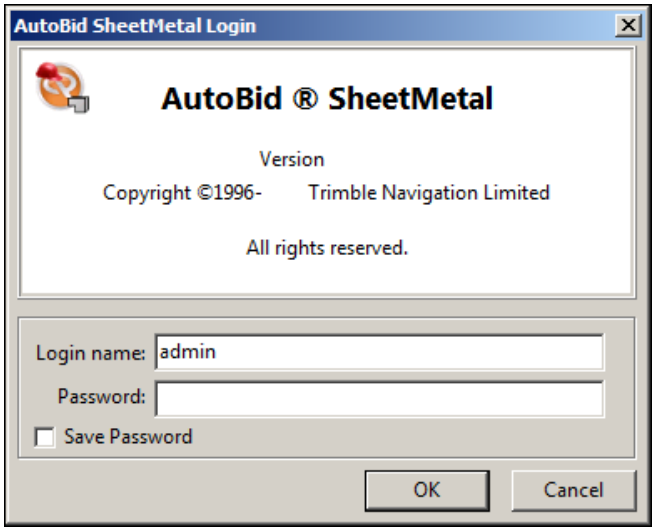
- AutoBid SheetMetal includes videos that detail features and enhancements included in the software. See *"Video Presentations" on page 116* for more information.


On-line Videos!
Bid Administrator - (LHS-17) Lakewood High School
File Project Data TakeOff & Reports Worksheets & Final Estimate View Tools Help
Bid Administrator Help
Bid Administrator Manuals
QuickPen on the Web...
Check the Web for Updates
What's New (in this release)?
Video Library...
About AutoBid SheetMetal...
Reminder: AutoBid SheetMetal's extensive library of instructional videos provides step-by-step directions for common tasks. Please review these videos:
Select Help on the main menu and then select one of these two highlighted options.
Important note: This release introduces major changes to the Systems Screen. If you are upgrading from a previous version of AutoBid, please review the detailed video tutorial:
Select Help on the main menu and then select What's New (in this release)?
Reports
This reminder will be shown once a day 4 more times.

Click anywhere to close this screen. **Note:** This screen may display several times/days when you first open the application. A message displays at the bottom that lets you know how many more times it will display.

Global Data Administrator

1. Double-click on the **Global Data Administrator** icon on your Windows desktop.
   OR
   Choose the Windows **Start** menu. Choose **Programs > AutoBid SheetMetal > Global Data Administrator**.
2. The AutoBid SheetMetal Login window displays.



Complete the following fields.

Login name

Enter '*admin*' in the Login name field.

HINT

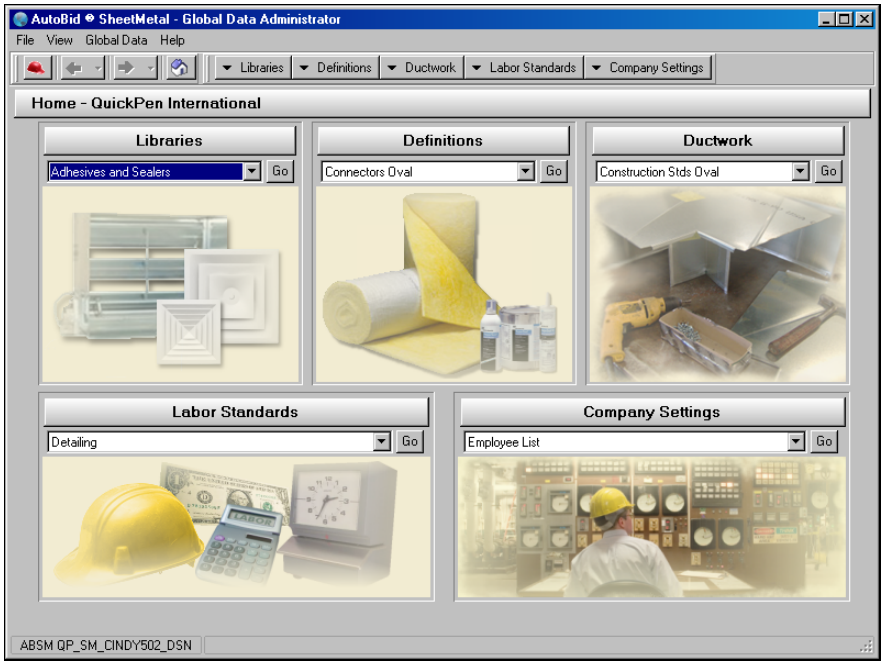
Your Windows login name may display by default in the Login name field. With your mouse, highlight the entire field and type in the Login name specified in this step.

Password

Enter the **Password** to access AutoBid SheetMetal. The password is provided in the back of this manual. *QuickPen recommends that you change this password immediately. Instructions are included on subsequent pages.*

3. If you want to save the password for future sessions, choose the **Save Password** checkbox. This saves the password in the field so you do not have to re-enter.

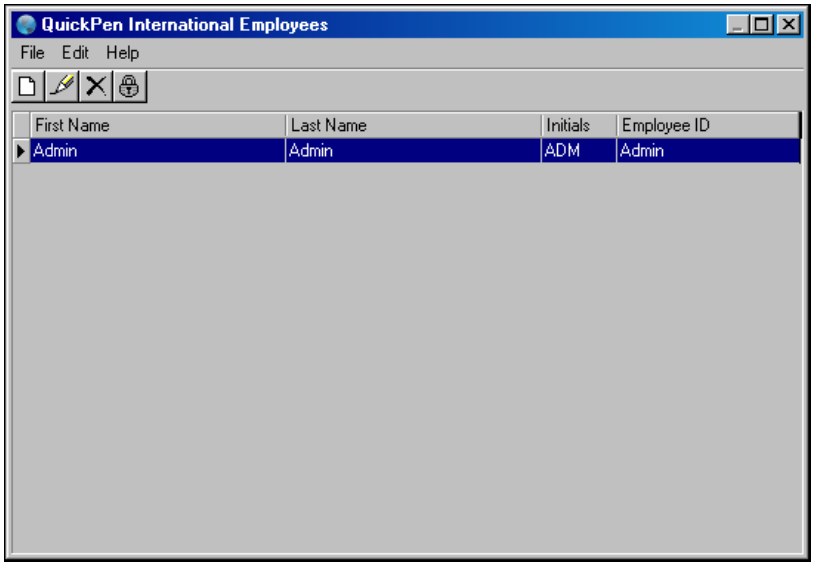
   Click **OK**.
   The AutoBid SheetMetal Global Data Administrator window displays.



Change Initial Password

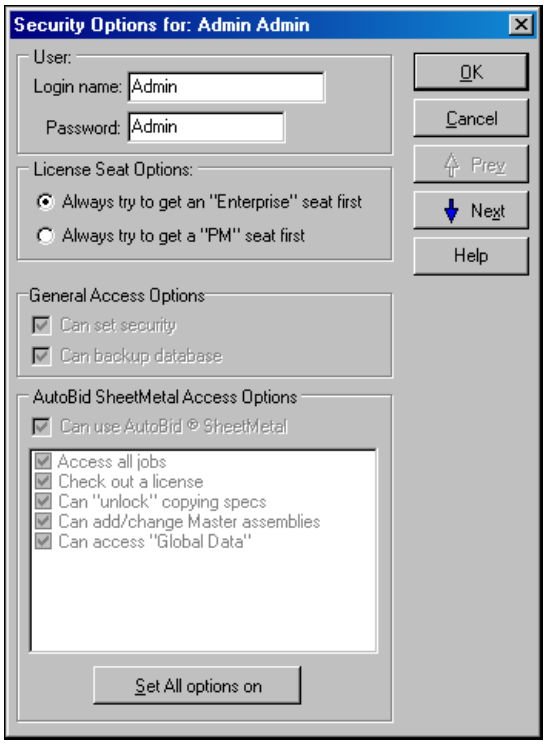
The initial access password provided allows access to all areas of AutoBid SheetMetal. To protect your data, QuickPen suggests that you change this password immediately.

1. In the AutoBid SheetMetal Global Data Administrator window, choose **Company Settings > Employee List**. The Employees list window displays.



"*Admin*" in the Employee List will be highlighted.

2. Choose **Edit > Employee Security**. The Security Options window for the user "*Admin*" displays.



   a. Click in the Password field. Enter the new password for the "*Admin*" user.

   b. Be sure to make note of the new password.

3. Click **OK**. Close the Employees window by clicking ☒ in the upper right corner of the window.

4. After you have modified the default password, QuickPen recommends that you close both the AutoBid SheetMetal Global Data Administrator

program and the AutoBid SheetMetal DataServer. This is a safeguard and allows the DataServer to recognize the new password.

HINT

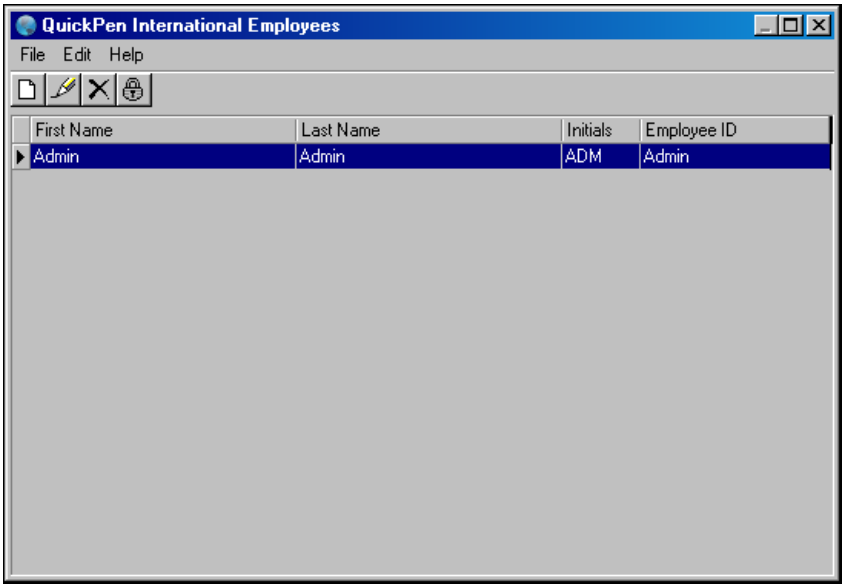
You must use the new password to access AutoBid SheetMetal when you reopen the application.

Create Administrator

QuickPen recommends that at least one AutoBid SheetMetal administrator be added at this time. You can add more if necessary. This is the primary person(s) responsible for maintaining the AutoBid SheetMetal database.

To add an employee administrator to the AutoBid SheetMetal database, proceed as directed below.

1. In the AutoBid SheetMetal Global Data Administrator main window, choose **Company Settings > Employee List**. The Employees window displays.



2. Click on the toolbar.
OR

Choose **Edit > Add Employees**.
The Add Employee window displays.

3. Complete the following information.

   First Name

   Enter the employee's first name.

   Last Name

   Enter the employee's last name.

   Initials

   Enter the employee's initials.

   Employee ID

   Enter the identification of the employee.

   Click **Add**.

4. Click **Close**.

Security and Access

After you have added the employee administrator to the database, you must set access to the appropriate rights.

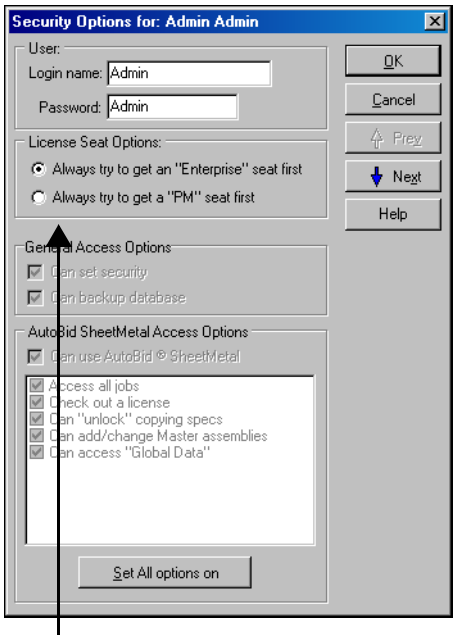
CAUTION

The employee administrator may be unintentionally locked out of AutoBid SheetMetal if access settings are not done properly. Please be very careful when entering and choosing the options in the Security Options window.

1. In the Employees window, highlight the employee administrator you created in the Employee List.
   Choose **Edit > Employee Security**.
   OR

Click on the toolbar.

The Security Options window for that employee displays.



The selected Employee record is framed.

2. Complete the information in the User pane.

HINT

If you are running AutoBid SheetMetal on a network or over the Internet, it is recommended that you use login names and passwords. Requiring employee login names protects your system from unauthorized access.

Login name

Enter a user name the employee will use to log into AutoBid SheetMetal. If you are using AutoBid SheetMetal on a network, the Login name should be the same one used to login in to the network.

Password

Enter the password the employee administrator will use when logging into the system. This can be the same password used when logging into the network computer. However, you can set up unique passwords to log into AutoBid SheetMetal.

The employee administrator must know the password you create. Without this information, they will be unable to access AutoBid SheetMetal.

3. In the License Seat Options pane, click the radio button that best applies for how the employee will be using AutoBid SheetMetal:

Always try to get an "Enterprise" seat first

The Enterprise license is required for using a digitizer or editing functionality in On-Screen View and Graphical View TakeOff. If an Enterprise license is available, TakeOff will always look to it first. Keep in mind that if you have a limited number of Enterprise seats, this setting may disallow the use of a digitizer and full On-Screen View/Graphical View TakeOff functionality.

Always try to get a "PM" seat first

If you do not have a digitizer attached to your computer and do no editing in On-Screen View or Graphical TakeOff, this setting should be selected.

4. Choose the appropriate checkboxes in the General Access Options pane.

   Can set security

   Choose this checkbox to allow the employee administrator to set security in AutoBid SheetMetal. The administrator must be able to grant or remove access rights from additional employees entered in the employee list. *QuickPen recommends that you allow very limited access to this function or security could be severely compromised*.

   Can backup database

   The administrator must have rights to backup the AutoBid SheetMetal database. Choose this checkbox to allow the selected employee administrator to process database backups from AutoBid SheetMetal Global Data Administrator.

HINT

The employee administrator must be allowed to perform all options in the Security Options window.

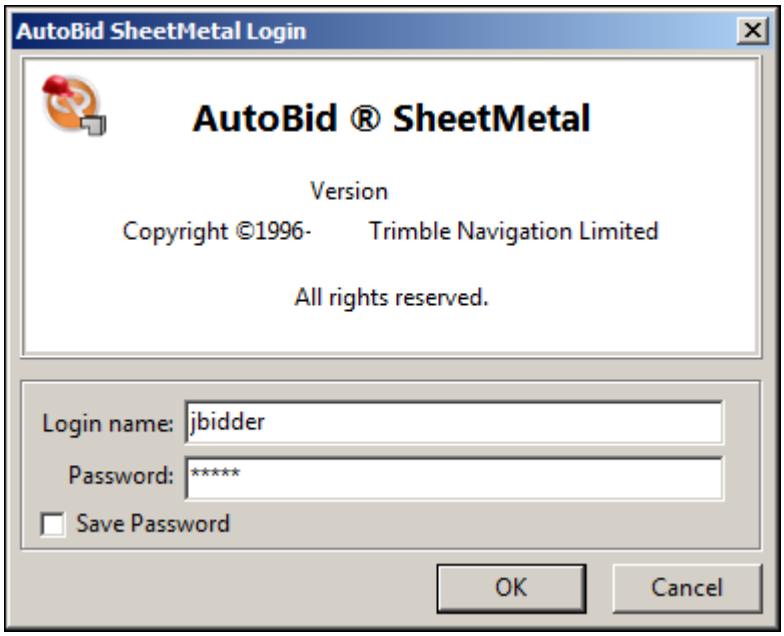
Additional information about security options, see the *Introduction* manual and/or the online help system.

AutoBid SheetMetal Bid Administrator

To access the AutoBid SheetMetal Bid Administrator, proceed as follows.

1. Double-click on the **AutoBid SheetMetal Bid Administrator** icon on your Windows desktop.
   OR
   Choose the Windows **Start** menu. Choose **Programs > AutoBid SheetMetal > Bid Administrator**. The AutoBid SheetMetal Login

window displays.



Complete the following fields.

Login name

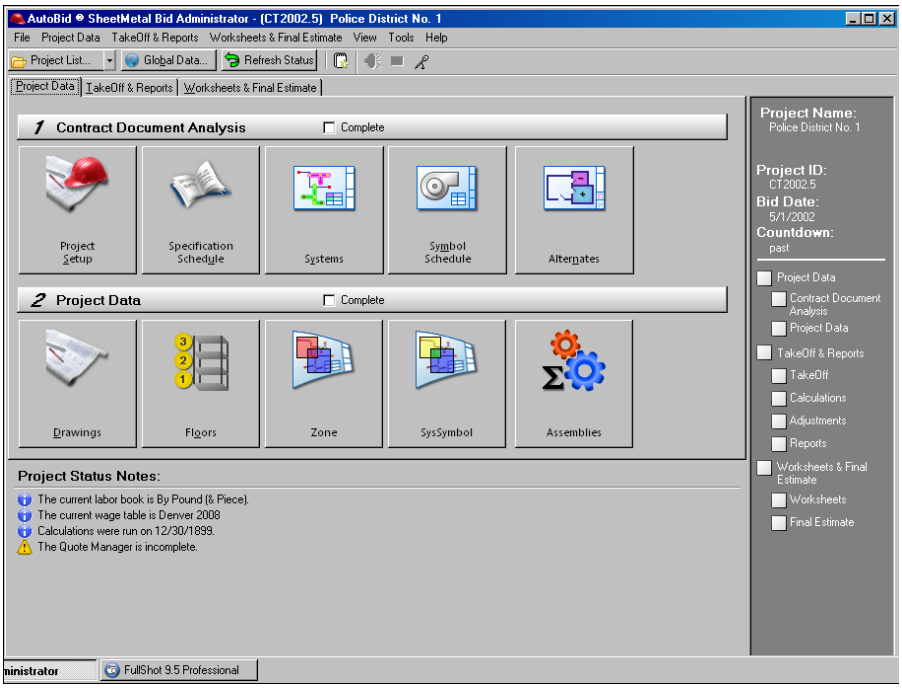
Enter the employee login in the Login name field.

Password

Enter the **Password** required to access the AutoBid SheetMetal.

OR

Click in the AutoBid SheetMetal Global Data Administrator window. The AutoBid SheetMetal Bid Administrator window displays.



Information on the AutoBid SheetMetal Bid Administrator is located in the online help system or other online manuals available in the software.

Chapter 8 Hardware Setup

This chapter explains how to set up and connect the hardware required if you are using a digitizer with AutoBid SheetMetal. This is the first step towards implementing your hardware.

This chapter explains how to do the following:.

- Configure your digitizer for AutoBid SheetMetal
- Mount the TouchMenu
- Connect the Smart Menu
- Connect the MobileMenu
- Set DIP Switches for older Type 5 controllers
- Solve hardware setup problems.

Before you begin, you should know the following information:

- Equipment location
- How AutoBid SheetMetal is being installed (network or stand-alone)

USB Adapter

If your computer comes with USB Ports but does not have Serial Ports (Legacy Ports) available for use with the digitizer, you must use a USB Serial Adapter.

The USB Serial Adapter connects to the USB port on your computer. You may then connect your digitizer to the Serial Port located on the back of the USB Serial Adapter.

- To install the USB Serial Adapter on your computer, follow the instructions that accompany the unit.
- Once connected to your computer, refer to the *“GTCO Tabletworks” on page 85* for additional instructions.

GTCO Tabletworks

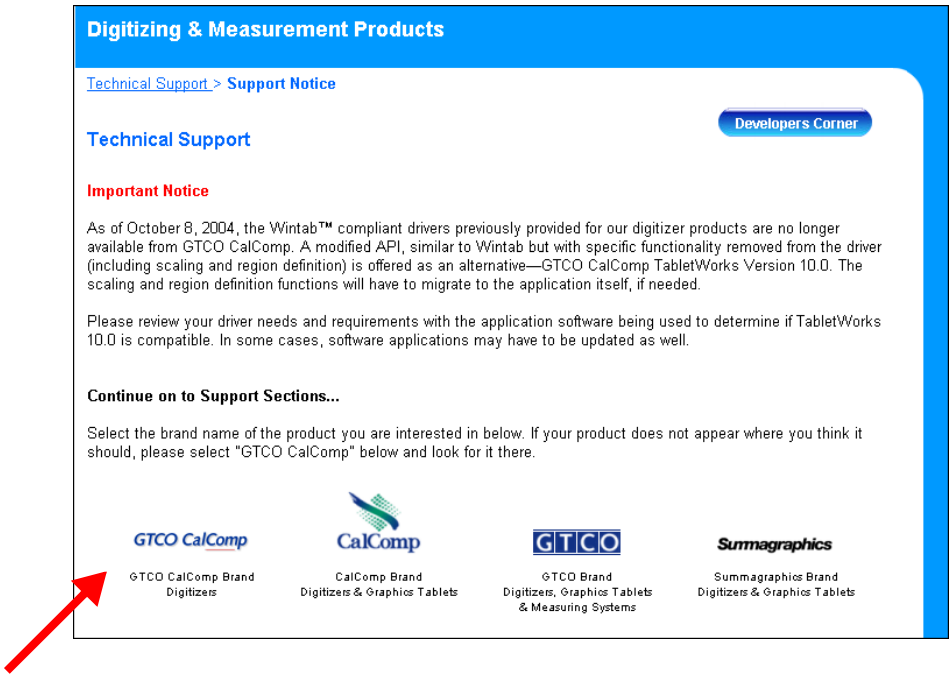
If you are using a Smart Menu™ by GTCO or Digitizer that uses a USB connection, you must download Tabletworks software from the GTCO website and install it on your computer in order to use this hardware. This software is required on all workstations using a USB Smart Menu or Digitizer.

HINT

Downloading this software is recommended prior to attaching any hardware to your computer.

1. Open your web browser and go to *www.gtco.com*. The main page opens.
2. Click on **Technical Support > Large-Format Digitizers**.

3. In the next screen, click on **GTCO CalComp**.


Digitizing & Measurement Products
Technical Support > Support Notice
Developers Corner
Technical Support
Important Notice
As of October 8, 2004, the Wintab™ compliant drivers previously provided for our digitizer products are no longer available from GTCO CalComp. A modified API, similar to Wintab but with specific functionality removed from the driver (including scaling and region definition) is offered as an alternative—GTCO CalComp TabletWorks Version 10.0. The scaling and region definition functions will have to migrate to the application itself, if needed.
Please review your driver needs and requirements with the application software being used to determine if TabletWorks 10.0 is compatible. In some cases, software applications may have to be updated as well.
Continue on to Support Sections...
Select the brand name of the product you are interested in below. If your product does not appear where you think it should, please select "GTCO CalComp" below and look for it there.
GTCO CalComp
GTCO CalComp Brand Digitizers
CalComp
CalComp Brand Digitizers & Graphics Tablets
GTCO
GTCO Brand Digitizers, Graphics Tablets & Measuring Systems
Summagraphics
Summagraphics Brand Digitizers & Graphics Tablets

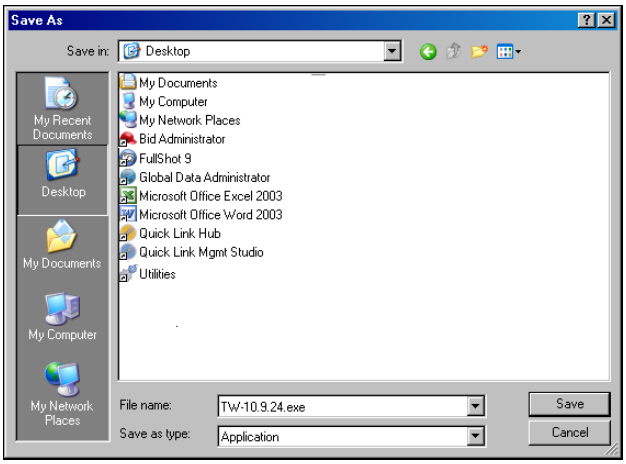
4. On the next page, click on **Drivers & Software Downloads**.
5. Select the first link on the next screen.

HINT

The actual name of the Product may change. However, the latest release of GTCO digitizer drivers will always be listed first.

6. Click on the file in the **Download** column. ***Note: This file name will change from time-to-time as GTCO posts recent updates.***

7. In the File Download - Security Warning screen, click **Save**. Navigate to the location where you want to save the file.



Make note of where you saved the file.

Install Drivers

When the download is complete, proceed as follows.

1. Navigate to the location of the downloaded driver file. Double-click on it.

Open File - Security Warning
Do you want to run this file?
Name: TW-10.05.0005.exe
Publisher: GTCO CalComp, Inc.
Type: Application
From: C:\Documents and Settings\cynthiac\My Documents
Run
Cancel
Always ask before opening this file
While files from the Internet can be useful, this file type can potentially harm your computer. Only run software from publishers you trust. What's the risk?

2. Click **Run**. The routine will go through several screens. Click the **Next** button on each.
3. In the License Agreement screen, click **Yes**.
4. In the GTCO CalComp TabletWorks screen, accept all defaults and then click **Next**.
5. An informational screen displays. You can click the **Print** button for future reference or read on-screen. Click **Next**.

   The installation routine performs several steps, including looking for previous versions of the driver.
6. In the final screen, click **Finish**. An icon will now display in the System Tray.

Smart Menu™ by GTCO

The Smart Menu is a tool for estimators. It simplifies functions and features, making them quickly accessible in AutoBid SheetMetal. This menu is small enough to fit inside your laptop carrying case.

- The Smart Menu you have may use a serial or USB connection.
- You can also use the Smart Menu with or without a digitizer.

This menu is available for purchase from QuickPen. Please contact your QuickPen Sales Representative for more information.

Serial Connection

Older Smart Menus use a serial port for connection to your computer. You can connect it directly to your computer (for use with On-Screen View TakeOff) or it can be connected to your digitizer. The type of connection is dependant on how you will be using the menu in AutoBid SheetMetal.

Depending on how you will be using the Smart Menu, connect it according to the documentation included with the menu.

After you have attached the Smart Menu, you must activate it in AutoBid SheetMetal. See *"Activate Smart Menu"* for instructions.

Connect USB Smart Menu (No Digitizer)

The instructions included in this section provide information on connecting a Smart Menu to your computer without a digitizer.

1. The Smart Menu should not be connected to any device during the installation. Make sure it is disconnected (unplugged) from your computer
2. Review the connection instructions that accompanied your Smart Menu.
3. Attach the Smart Menu to a USB port on your computer.
4. Refer to *“TabletWorks Control Panel” on page 95* and then *“Activate Smart Menu” on page 91* for instructions on configuring AutoBid SheetMetal to use the Smart Menu.

Connect USB Smart Menu (With Digitizer)

1. The Smart Menu should not be connected to any device during the installation. Make sure it is disconnected (unplugged) from your computer and digitizer.
2. You must also complete the following prior to completing the installation routine.
   - **Power off** your digitizer
   - **Disconnect the power supply** from the digitizer
3. Connect the Smart Menu to the digitizer using the phone jack to phone jack cable.
4. Connect the power supply to the digitizer and **power it on**.
5. With the TouchPen, press the **Reset** button on the digitizer and then **CAD**.
   Note: These buttons are located toward the top center of your digitizer.
   OR
   If the **Reset** and **CAD** buttons are not available on your digitizer, press **S 0 9**.
6. Connect the Smart Menu USB cable to an available USB port on your computer. See the Smart Menu Installation diagram included with your hardware.

TabletWorks Control Panel

1. Double-click on the **TabletWorks** icon .
2. Verify that TabletWorks recognizes the Smart Menu, and if applicable, the Digitizer. ***Note***: You might need to click **Refresh List** in order for TabletWorks to recognize the configuration. Ensure that ***no red X displays*** over the TabletWorks icon.

3. Verify the following:
   - If not already selected, click the **Mouse** checkbox.
   - Make sure the **TabCon** checkbox is cleared.
4. In the Cursor Information pane, click the **Specify a Cursor** and then select **Stylus** from the list.

After you have attached the Smart Menu, you must activate it in AutoBid SheetMetal. See *"Activate Smart Menu"* for instructions.

Activate Smart Menu

After you have attached the Smart Menu to your computer, you must activate it.

1. Open AutoBid SheetMetal Utilities using one of the following methods:

   Click

   on your Windows Desktop.

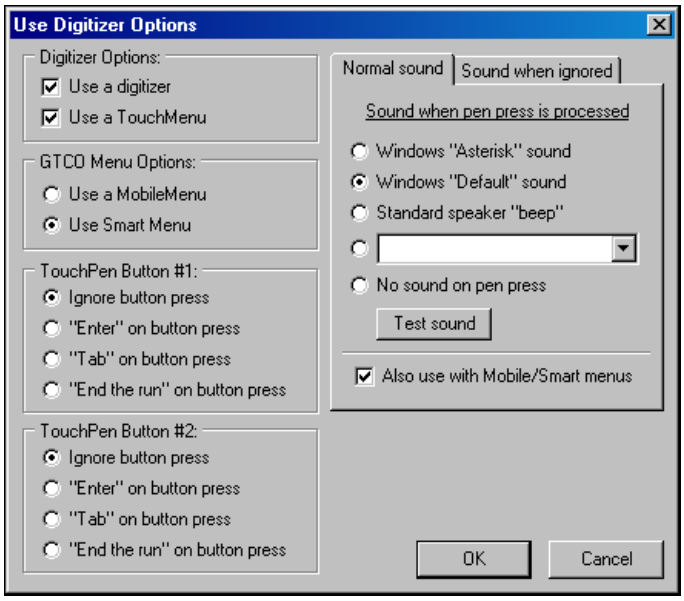
   OR

   Go to the Windows **Start** menu and navigate to **AutoBid SheetMetal > Utilities**.

The AutoBid SheetMetal Utilities window opens.

Version, Current User, and Company are based on licensing information.

2. Go to **Tools > Set Use Digitizer/Menu Options**.The Use Digitizer Options window opens.



3. Click the **Use Smart Menu** radio button and then click **OK**.

HINT

The Smart Menu and MobileMenu cannot be used at the same time. In order to use the MobileMenu instead of the Smart Menu, you must complete the process above and click the **Use a MobileMenu** option.

4. You are now ready to begin using the Smart Menu with your AutoBid SheetMetal software.

Digitizers

AutoBid SheetMetal currently works with several GTCO digitizers.

- GTCO Super L Series
- Roll-Up digitizers
- Drawing Board Series

Attaching, configuring and setting up each type of digitizer is covered on the following pages. To configure to work with the Smart Menu by GTCO, refer to *“Smart Menu™ by GTCO” on page 89*.

CAUTION

Attaching cables to computers/controllers and ports should always be done when the computer or power strip/surge protector is turned off. When everything is properly cabled, turn the computer or power strip/surge protector on.

USB Digitizers

The instructions in this section detail how to connect digitizers using a straight USB connection. If you are using a Digitizer with a Smart Menu, refer to *"Connect USB Smart Menu (With Digitizer)" on page 90* for instructions.

HINT

If your digitizer has a serial cable or you are using a USB adapter, refer to *"Serial Port Digitizers" on page 95* for details on connecting these to your computer.

1. Connect the USB and stylus cables to the digitizer.
2. Connect the digitizer USB cable to your computer.
   - Do not connect the power supply cable (if available). The digitizer draws power from the USB connection.

CAUTION

Connecting the power supply with a USB will cause a power surge to the digitizer. This may result in serious damage and loss of use.

   - If you are using a laptop computer, you may have to try different USB ports to find one that has sufficient power to run the digitizer. You may find that the ports on the back are generally better than the ports on the side.

Setup USB Digitizer

1. Open AutoBid SheetMetal Utilities and choose **Tools > Digitizer Tests**.
2. In the QuickPen Digitizer Diagnostics window, click on the **Setup Digitizer** button.
3. In the Configure Digitizer Controller window, proceed as follows.

a. Click the **General** tab.

b. Choose the **Use WinTab drivers/Tablet Works** radio button.

c. Click **OK**.

4. A message displays for you to make sure your digitizer is connected properly. Click **OK** and then close AutoBid SheetMetal Utilities.
5. Close all programs on your computer and restart your machine.
6. When the computer restarts, you may notice a **Found New Hardware** message near your System Tray. The TabletWorks Control Panel icon displays in the System Tray.

TabletWorks Control Panel

1. Double-click on the **TabletWorks** icon.
2. In the TabletWorks Control Panel window, clear the **Mouse** checkbox. This enables you to use the TouchPen (stylus) with your digitizer instead of the mouse. Although the mouse feature is available, using both the mouse and TouchPen may cause conflicts.
3. Click **Apply** and then **OK**.

Serial Port Digitizers

1. Turn your computer off.
2. Connect the digitizer to your computer according to the directions included with your board.

Additional Steps

1. Turn the digitizer power switch to the **On** position.
2. Turn your computer back on. Your system recognizes the new hardware and updates accordingly. ***Note:*** Nothing displays on-screen during this process.

Depending on the type of TouchPen you have, it may have a red light near the top end. This is called a proximity light. To determine if the TouchPen and digitizer are communicating, hold the TouchPen above and perpendicular to

the active area of digitizer. Move the TouchPen toward the digitizer until the proximity light comes on. This will normally occur when it is within an inch of the digitizer. If the light does not come on, check all connections, including the power supply.

You must now configure your digitizer and stylus (TouchPen) to work with your AutoBid SheetMetal software. Refer to *"Configure Digitizer" on page 97* for instructions.

Final Digitizer Steps

Before you can use the digitizer with the software, there are some final steps that you must complete. Because your digitizer will only have one of these options, choose the one appropriate to the type you are using.

- Touch the **EST-WIN** button on the digitizer.
  The EST-WIN button on the digitizer causes the digitizer and computer to communicate in the most efficient mode. You will hear four beeps when you choose EST-WIN.
- If you have a digitizer that has SELECT CAD EST RESET on the top, touch **SELECT+CAD**.
- If you have a digitizer with the **S0123456789** button panel, touch **S04**. This allows the digitizer to communicate with the software.

When you touch these options on your digitizer, you will hear four beeps. This indicates that proper configuration of the digitizer has been established. If you experience problems, contact QuickPen Technical Support for assistance.

CAUTION

Do not choose **Reset** at the top of a 5-cell rigid digitizer unless directed to do so by QuickPen Technical Support. Resetting the digitizer can cause operation and communication problems with AutoBid SheetMetal.

Test Digitizer

1. Open AutoBid SheetMetal Utilities once again.
2. Choose **General > Test Digitizer**. Next to the WinTab Connection field, you should now see the message ***Connection Successful***.
3. Touch your pen anywhere inside the active area of the digitizer. The Test WinTab Connection window will display your coordinates and position on the board. Click **Close**.
4. Open TakeOff, orient your TouchMenu and align the drawing. You can then process a TakeOff.

   For more information on these procedures, see the *TakeOff and Reports* manual or the online help system.

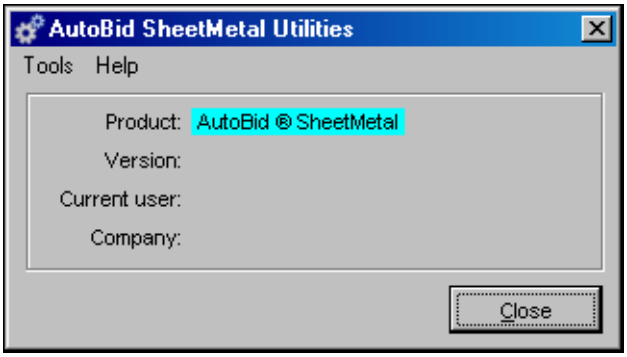
Configure Digitizer

Proceed with the following instructions to configure the digitizer to communicate with your AutoBid SheetMetal system.

HINT

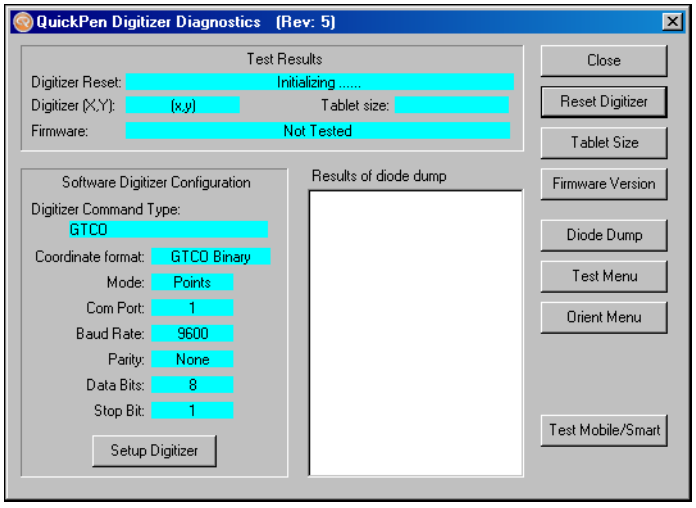
You generally need to set up the digitizer only one time. Once the settings are selected, they will remain in place until you manually change them.

1. From the Start menu, navigate to **AutoBid SheetMetal > Utilities**. The AutoBid SheetMetal Utilities window displays.



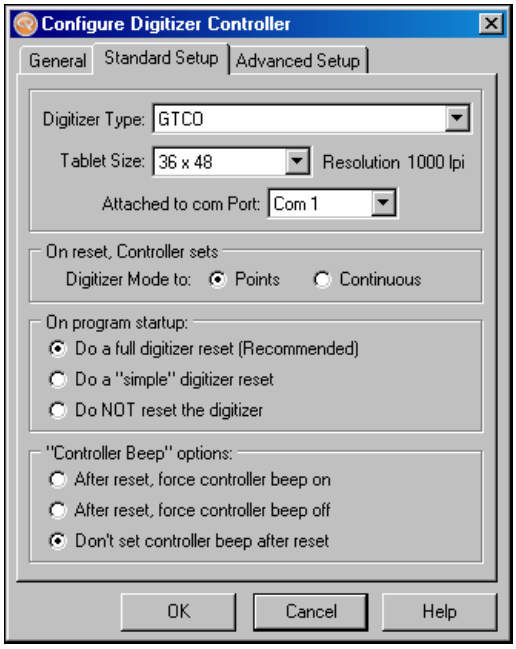
Version, Current User, and Company are based on licensing information.

2. Choose **Tools > Digitizer Tests**.



The current settings for the digitizer are displayed in the Software Digitizer Configuration pane.

3. Click **Setup Digitizer**. The Configure Digitizer Controller window displays.



HINT

The Digitizer Setup options are preset to the defaults. You do not need to modify these settings *unless* your computer system requires different settings.

4. Complete the following as needed:

Standard Setup tab

Digitizer Type

If you have more than one type of digitizer installed, choose the digitizer you want to use from the list.

- For most digitizers, the selection will be **GTCO**.
- For Drawing Board III, select **CalComp 9100**.

Attached to COM Port

From the list, choose the appropriate COM Port your digitizer will use. You may need to cycle through the list to locate the port set up for your computer.

On reset, Controller sets Digitizer Mode to

These settings depend upon what type of digitizer you are using. Choose one of the following options:

Points

Choose this option if your digitizer is one of the following:

- **Super L series digitizers with the EST-WIN setting**
- **Roll up digitizers using S04 setting**

Continuous

Choose this option if your digitizer is one of the following:

- **Existing Super LII digitizers with the SELECT/CAD setting**
- **Older 5 and 5a controllers where you physically change the DIP Switches**

On program startup

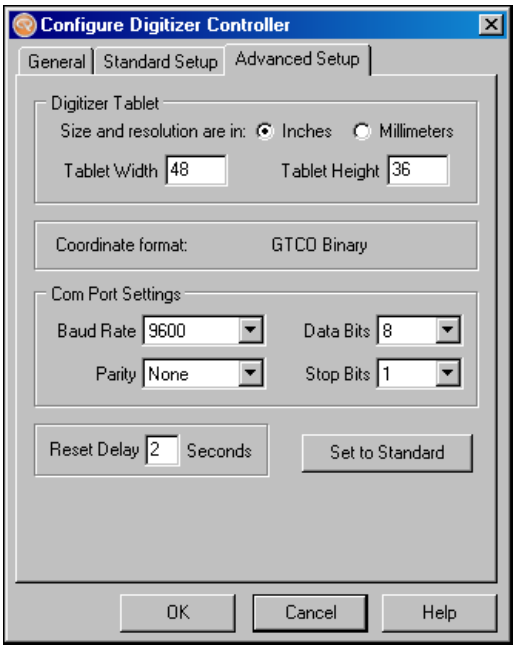
Click **Do a full digitizer reset (recommended).** Additional options are available for selection; however, to make sure your digitizer is working properly every time, QuickPen recommends that you select this option.

Options

Choose one of the following options:

- **After Reset, Force Controller Beep On**
- **After Reset, Force Controller Beep Off**
- **Don’t Set Controller Beep After Reset**

Advanced Setup tab



Digitizer Tablet

Choose **Inches** or **Millimeters**, depending on which units you use.

Tablet Width

Enter the **Tablet Width** of your digitizer.

Tablet Height

Enter the **Tablet Height** of your digitizer.

HINT

The above options pertain to the active area of your digitizer and not the total size of the board.

COM Port: Settings

Do not change this setting from the default.

Reset Delay ____ Seconds

Enter the delay from the reset operation to when the digitizer is activated.

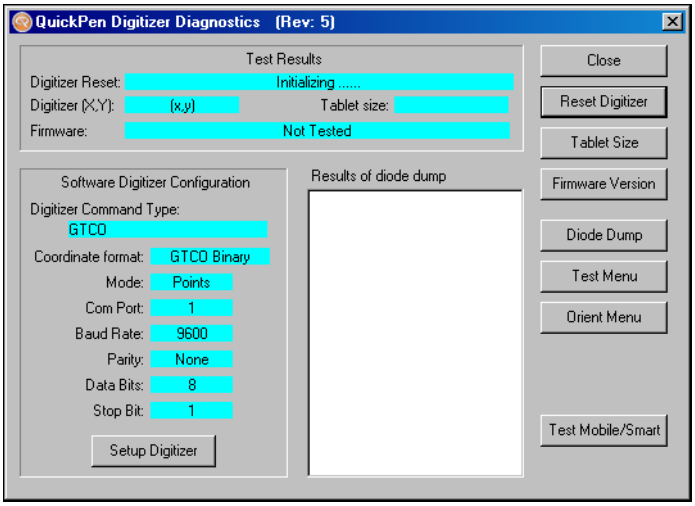
Set to Standard

Click on the **Set to Standard** button to return all settings to the defaults.

5. Click **OK** when you are done.
6. You will be prompted to reset the digitizer after clicking **OK**. Click **Yes** in this dialog.
   OR
   In the QuickPen Digitizer Diagnostics window, choose **Reset Digitizer**. The results of the test are displayed in the Test Results pane.

Other Digitizer/TouchMenu Options

The QuickPen Digitizer Diagnostic window includes additional options that, from time-to-time, may prove helpful when using your digitizer.



As you choose many of the buttons, the fields on the screen become populated with data based on your choices.

Reset Digitizer

Choose this button after you have selected the settings for your Digitizer under the SetUp Digitizer button. This tests your settings and displays a message if the reset is successful.

Tablet Size

Choose this button to view the size of your digitizer tablet.

Firmware Version

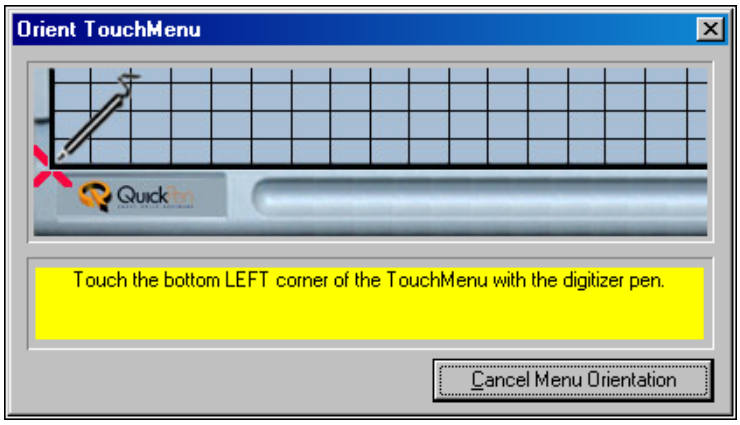
To view the type of Firmware your digitizer uses, choose this option.

Diode Dump

This option should be used with the assistance of QuickPen Technical Support. Support uses the information produced by this test to assist you with certain problems.

Orient Menu

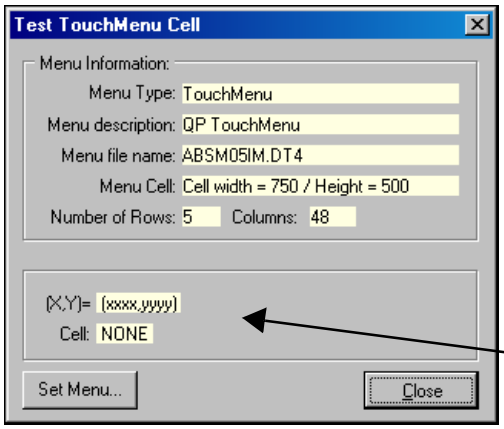
Click **Orient Menu** so AutoBid SheetMetal recognizes that the menu exists. The Orient TouchMenu window displays.



Follow the on-screen instructions to complete the orientation of the TouchMenu.

Test Menu

Click **Test Menu** to verify that the TouchPen and TouchMenu are communicating properly. The Test Menu window displays.



Result displays when a valid item is touched on the TouchMenu.

The TouchMenu is used with the digitizer during TakeOff. Using a TouchPen, you touch cells on the TouchMenu and then points on the drawing. The information is entered into AutoBid SheetMetal. The TouchMenu is shipped with your digitizer.

Cells on the TouchMenu (TouchBoxes) are named for the various functions they perform.

- Items to take off drawings, such as pipe, fittings, or equipment
- Commands to process TakeOff data, such as printing or saving
- Toggles to change settings, such as turning on and off the automatic calculation of insulation on items.

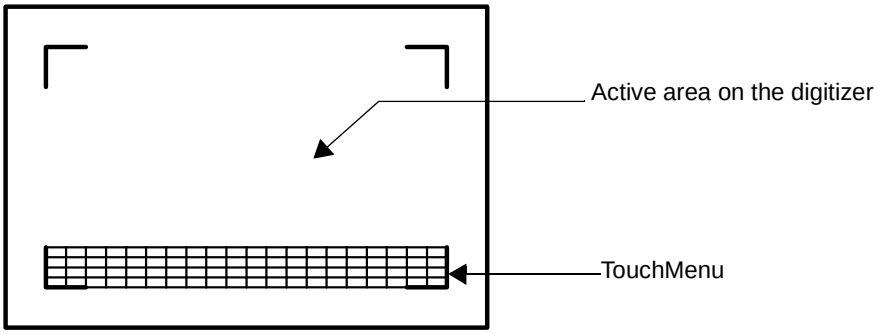
TouchMenu

Other TouchMenu functions include a numeric keypad and arrows that allow you to move the cursor throughout TakeOff. Cells with similar functions are grouped together.

Mount TouchMenu

Before you can use the TouchMenu, it must be properly mounted on the digitizer. Complete the following procedures to mount the TouchMenu.

1. Attach the TouchMenu holder frame so it is in the digitizer's active area. You can use double-sided tape to help you position the frame properly.
2. Place the TouchMenu inside the holder. The graphic below illustrates proper positioning.



You must now configure the digitizer to work with AutoBid SheetMetal. Proceed to the *"Configure Digitizer" on page 97* for instructions.

MobileMenu

The MobileMenu is a legacy portable menu for use with or without a digitizer. This menu is user definable: You can add items, assemblies, or functions to the MobileMenu. *This menu is a legacy model and no longer available. It has been replaced by the Smart Menu. However, we are providing these instructions for those who already have a MobileMenu.*

CAUTION

The MobileMenu does not require TabletWorks; however, if you are using a USB Digitizer also, it is required.

Connect the MobileMenu

Connect the MobileMenu according to the instructions included when you purchased the menu. ***Note:*** Always plug in the power cable last. This helps the software recognize signals from the controller to the computer.

If connected properly, the MobileMenu light will flash four (4) times. If you do not see the flashing light, turn the MobileMenu off and check your connections once again.

HINT

If you have trouble getting the MobileMenu to work, touch the digitizer pen to the digitizer to get the signals working.

Activate MobileMenu

After you have attached the Smart Menu to your computer, you must activate it.

1. Open AutoBid SheetMetal Utilities using one of the following methods:

Click

on your Windows Desktop.

OR

Go to the Windows **Start** menu and navigate to **AutoBid SheetMetal > Utilities**.

The AutoBid SheetMetal Utilities window opens.

2. Go to **Tools > Set Use Digitizer/Menu Options**.The Use Digitizer Options window opens.
3. Click the **Use a MobileMenu** radio button and then click **OK**.

HINT

The MobileMenu and Smart Menu cannot be used at the same time. In order to use the Smart Menu instead of the MobileMenu, you must complete the process above and click the **Use Smart Menu** option.

You are now ready to begin using the MobileMenu with your AutoBid SheetMetal software.

Help Resources

Contents

"Online Help/Videos"

The Help Resources section provides information on help and online documents available in AutoBid SheetMetal.

Chapter 9 Online Help/Videos

Obtaining information is important when you are working in any software package. AutoBid SheetMetal provides online documentation and videos that can be accessed from directly within the software.

This chapter explains the organization and content of the documentation. Directions are also included on accessing the documentation.

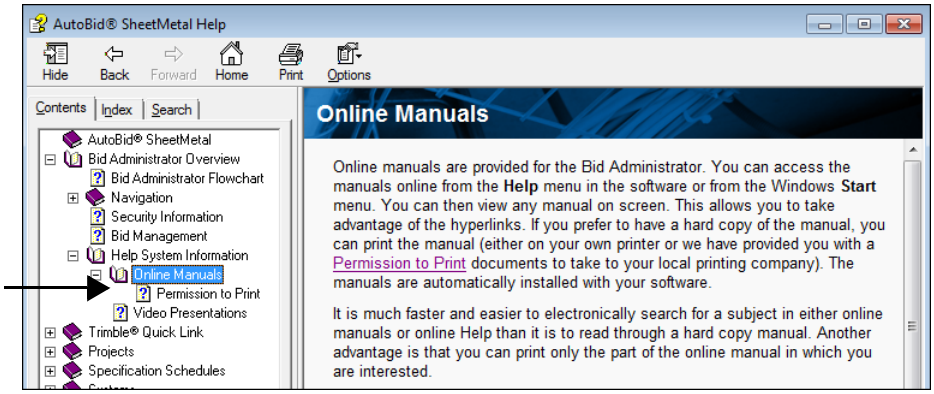
Online Manuals

You can access all manuals online from the Help menu in the software. The manual can be viewed on the screen. This allows you to take advantage of the hyperlinks. Hyperlinks are displayed on your screen in *blue italics*. Clicking on *hyperlinks* will take you directly to that information.

Manuals are automatically installed with your AutoBid SheetMetal software.

If you do not have Adobe Reader installed, you must install it now. See *"Online Help/Videos" on page 113* for instructions.

If you want professionally bound hard copies, see the *Permission to Print* document in the online help file.


AutoBid® SheetMetal Help
Hide
Back
Forward
Home
Print
Options
Contents
Index
Search
AutoBid® SheetMetal
Bid Administrator Overview
Bid Administrator Flowchart
Navigation
Security Information
Bid Management
Help System Information
Online Manuals
Permission to Print
Video Presentations
Trimble® Quick Link
Projects
Specification Schedules
Online Manuals
Online manuals are provided for the Bid Administrator. You can access the manuals online from the Help menu in the software or from the Windows Start menu. You can then view any manual on screen. This allows you to take advantage of the hyperlinks. If you prefer to have a hard copy of the manual, you can print the manual (either on your own printer or we have provided you with a Permission to Print documents to take to your local printing company). The manuals are automatically installed with your software.
It is much faster and easier to electronically search for a subject in either online manuals or online Help than it is to read through a hard copy manual. Another advantage is that you can print only the part of the online manual in which you are interested.

Click on the **Permission to Print** topic.

This document contains all the information a printer needs to professionally produce printed and bound manuals. Keep in mind that the manuals are updated all the time. If you print and bind the entire manual, your copy will be obsolete the next time you receive a software update.

QuickPen suggests that you follow the instructions included on the following pages to open the online manuals. This will allow you to see how easy it is to use manuals online.

Manuals from the Start Menu

To open the online manuals from the **Start** menu, perform the following steps.

1. Choose the **Start** and navigate to **AutoBid SheetMetal > Documentation**.
2. Click on the appropriate manual.

Manuals from the Help Menu

To open the online manuals from the **Help** menu, perform the following steps.

1. In the AutoBid SheetMetal main window, choose **Help > AutoBid SheetMetal Manuals**.
2. Click on the appropriate manual.

Manual Layout

Online manuals are organized into specific topics. The online manuals mirror the help file contents. You can print a single topic from help or several topics from the manuals

Find Information in the Manuals

There are several methods to find information when using online manuals.

- Check the index for each manual. The topic you want is probably there. If you are unable to locate the topic, try thinking of the topic a little differently. For instance, you might try looking for the word *Deleting* instead of the word *Removing*.

- Scan the *Table of Contents* for each manual. Look for the topic you need. The contents are logically arranged for proper use of AutoBid SheetMetal.

HINT

Tables of Contents and Indexes are linked to each chapter or topic. Click on the item in the Table of Contents or Index and the online manual automatically moves to the page for that topic.

When you open the manual, the Adobe Reader window displays.

- The Navigation Pane is located on the left side of the window. The Navigation Pane displays section, chapter and topic information.
- Use the Hand Tool to click on a topic and the page moves to that topic in the manual.
- Use the Find tool to search for keywords in the online manuals.
- The online manual contains blue references (*hyperlinks*). Clicking on a hyperlink will immediately take you to the page or topic referenced. Using hyperlinks allows you to navigate quickly through the manuals to find specific information.

Help System

Accessing online help can be done from the AutoBid Mechanical main window or the AutoBid SheetMetal TakeOff window.

You can also press the **F1** key in most windows to take you immediately to the help topic.

Video Presentations

AutoBid SheetMetal includes video presentations that explain certain features and functions of the application. You have the option of installing the videos to your hard drive or viewing them from the Installation DVD-ROM.

Two types of videos are included with AutoBid SheetMetal.

- The *Video Library* provides you with information on how to perform certain functions in the software.
- *What's New* videos provide you with information detailing how to use new features and commands available in update releases.

Before you can view the videos, you must have either installed AutoBid SheetMetal or have the Installation DVD available.

See the *Master Settings and System Maintenance* online manual for detailed information.

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QuickPen AutoBid® SheetMetal

DataServer Initial Password

SQL

AutoBid SheetMetal Initial Password

Admin

QuickPen recommends you change the initial password as soon as possible after installation. Doing so will prevent access to the database by unauthorized individuals.